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ABSTRACT

Uniform procedures, terminology, definitions, forms, and instructions for the completion of state reporting requirements are presented as a management aid for the individual Florida community colleges. A calendar of required reports is presented first, along with an explanation of the Community College Information Classification Structure (CCICS) by which data from the 28 colleges are uniformly organized according to a hierarchy of functions and activities. The statewide course numbering system and its relationship to the CCICS are then described, followed by an examination of the purposes, procedures, and forms for each of 17 reports required by the State Division of Community Colleges. These reports cover the college operating budget, annual finance, quarterly finance, cost studies, student fees and waivers, facilities inventories, space utilization, personnel and salaries, full-time equivalent enrollment, opening fall headcount, fall headcount by age groups, annual enrollment headcount, teacher-staff utilization, placement and follow-up of graduates and leavers, community instructional services, annual credit outputs, and staff and program development. Included in the appendix are reports and references to reports which were collected from the community colleges by other Florida state agencies. (JP)

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# COMMUNITY COLLEGE
# MANAGEMENT INFORMATION SYSTEM
# PROCEDURES MANUAL

AUGUST 1980

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JC 800 530

# COMMUNITY COLLEGE
# MANAGEMENT INFORMATION SYSTEM
# PROCEDURES MANUAL

AUGUST 1980

DIVISION OF COMMUNITY COLLEGES

FLORIDA DEPARTMENT OF EDUCATION
RALPH D. TURLINGTON, COMMISSIONER
TALLAHASSEE, FLORIDA

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# SECTION 1

## INTRODUCTION

The purpose of the Community College Management Information System (CCMIS) Procedures Manual is to document the procedures, terminology, definitions, forms, and instructions which will be used by individual colleges. This Manual is basically a revision of the Community College Management Information System (CCMIS) Procedures Manual, June 1977 which documented standard reporting requirements for community colleges in Florida.

The Division of Community Colleges is aware of the heavy reporting burden in each of the colleges and exercises every possible restraint not to add to that burden. In spite of these efforts, several reports have been added since the June, 1977 version of the Manual (FE-1, FW-1, AA-1E, AA-4, AA-5). Two reports have replaced other reports (RF-1 replaced by SU-1 and OE 346-2 replaced by NCES 2404-1). One report has been deleted (Program Budgets).

In order to achieve the best possible update of the Manual, a CCMIS Task Force was established to represent the colleges, other organizations in the Department of Education and the Division in the updating process. Members of this Task Force are listed in Appendix C. Their efforts are gratefully acknowledged; their contributions to this update have been invaluable.

In addition, the Division of Community Colleges has received numerous suggestions and recommendations regarding specific aspects of the Manual. Many of these also have been incorporated into the Manual. It is our belief that this revision both clarifies and simplifies procedures, terminology, etc. Further, the Division attempted to include all State and Federal reports which are part of on-going data collection efforts and required from most colleges (see Appendix B).

The primary objective of the reporting system is to insure the comparability of information submitted by each college. The following conditions must exist for the information to be comparable:

A. Data are arrayed in a common structure. To accomplish this, most reports are organized to collect information in the format of the Community College Information Classification Structure. This will provide a common thread running through the information collected.

B. Data are inserted in the structure using standard procedures and classification provided by the Statewide Course Numbering System.

C. Data elements are defined in the same way.

D. Data are aggregated and summarized using the same procedures.

With the uniform application of the information classification structure, procedures and definitions by each college, comparable information and an improved information system should be obtained to better serve the colleges and the Division.

## DIVISION OF COMMUNITY COLLEGES

## CHART OF REPORTS

| DUE DATE | REPORT | REPORT TITLE | SECTION |
|---|---|---|---|
| July | | | |
| 1 | HEGIS 2300-1 | Institutional Characteristics of Colleges and Universities | Appendix B |
| 15 | IU-1,2,3,4 | Facilities Inventory Updates | 8 |
| 15 | CO-2 (OEFC 352) | Six-Month Capital Outlay Encumbrance Projection and Request for Encumbrance Authorization | Appendix B |
| 15 | CO-3 (OEFC 351) | Quarterly Report: Capital Outlay Funds | Appendix B |
| August | | | |
| 15 | AFR | Annual Financial Report | 4 |
| 15 | HEGIS 2300-8[2] | Adult/Continuing Education: Non-Credit Activities | Appendix B |
| 15 | ESE 333 | Adult Education Annual Report | Appendix B |
| September | | | |
| 10 | SPD-2 | SPD Activity Evaluation | 19 |
| 10 | SPD-3 | Financial Report Summary | 19 |
| 15 | AA-1 | Annual Enrollment Headcount Reports | 14 |
| 15 | EA-3 | Annual Report of Developmental and Community Instructional Services Enrollment | 14 |
| 15 | FA-4 | FTE Enrollment Report | 11 |
| 15 | HEGIS 2300-5[2] | College and University Libraries | Appendix B |
| 15 | NCES 2404-1 | Teacher-Staff Report (VEDS) | 15 |
| 15 | HEGIS 2300-2.1[1] | Degrees and Other Formal Awards Conferred | Appendix B |
| 15 | HEGIS 2300-7[2] | Inventory of College and University Physical Facilities | Appendix B |

DIVISION OF COMMUNITY COLLEGES

CHART OF REPORTS (Continued)

| DUE DATE | REPORT | REPORT TITLE | SECTION |
|---|---|---|---|
| October | | | |
| 1 | EF-1 | Opening Fall Enrollment | 12 |
| 1 | FA-2 | FTE Enrollment Report | 11 |
| 1 | FW-1 | Student Fees and Fee Waiver Report | 7 |
| 1 | HEGIS 2300-2.3[1] | Fall Enrollment and Compliance Report | Appendix B |
| 15 | HEGIS 2300-3 | Salary, Tenure and Fringe Benefits of Full-Time Instructional Faculty | Appendix B |
| 15 | SA-1 | Personnel and Salary Report | 10 |
| 15 | SA-2 | Salaries of Selected Positions | 10 |
| 15 | CO-2 (OEFC 352) | Six-Month Capital Outlay Encumbrance Projection and Request for Encumbrance Authorization | Appendix B |
| 15 | CO-3 (OEFC 351) | Quarterly Report: Capital Outlay Funds | Appendix B |
| 15 | HEGIS 2300-4 | Financial Statistics of Institutions of Higher Education | Appendix B |
| 15 | NCES 2404-2 | Financial Status Report (FA-397) | Appendix B |
| 20 | | Quarterly Financial Reports | 5 |
| 25 | CI-1 | Community Instructional Services Report | 17 |
| 25 | OA-1 | Annual Report of Output | 18 |
| 25 | OA-2 | Acceleration Report | 18 |
| November | | | |
| 1 | CA-1 | Identification of Operating Expenditures by Fund | 6 |
| 1 | CA-2 | Direct Cost of Primary and Support Programs and Personnel Resources | 6 |
| 1 | CA-3 | Full Cost of Instruction | 6 |
| 1 | HEGIS 2300-2.8[2] | Residence and Migration of College Students | Appendix B |

## DIVISION OF COMMUNITY COLLEGES

## CHART OF REPORTS (Continued)

| DUE DATE | REPORT | REPORT TITLE | SECTION |
|---|---|---|---|
| November (Continued) | | | |
| 1 | CO-1 (OEFC 304) | Annual and Five-Year Capital Projects Program Plans | Appendix B |
| 1 | | Feedback Report of Graduates | Appendix B |
| 15 | SU-1 | Space Utilization | 9 |
| December | | | |
| 5 | OCR EEO-6 | Higher Education Staff Information | Appendix B |
| 5 | OCR A1b | New Hires in Institutions of Higher Education | Appendix B |
| 5 | OCR A2 | Employees of State Agencies of Higher Education | Appendix B |
| 5 | OCR A3 | Retirements, Resignations and Dismissals at Institutions of Higher Education | Appendix B |
| 5 | OCR A4 | Promotion of Employees in Institutions of Higher Education | Appendix B |
| 5 | OCR A5 | Composition of Governing Boards for Higher Education | Appendix B |
| 5 | OCR B1 | Applications, Acceptances, and Actual Enrollments | Appendix B |
| 5 | OCR B3 | Financial Assistance to Students in Institutions of Higher Education | Appendix B |
| January | | | |
| 15 | CO-2 (OEFC 352) | Six-Month Capital Outlay Encumbrance Projection and Request for Encumbrance Authorization | Appendix B |
| 15 | CO-3 (OEFC 351) | Quarterly Report: Capital Outlay Funds | Appendix B |
| 20 | | Quarterly Financial Reports | 5 |
| 31 | DVE 393 | Annual Cosmetology Education Report | Appendix B |

## DIVISION OF COMMUNITY COLLEGES

## CHART OF REPORTS (Continued)

| DUE DATE | REPORT | REPORT TITLE | SECTION |
|---|---|---|---|
| February<br>1 | FE-1 | Fall Enrollment Headcount by Age Groups | 13 |
| 15 | FA-3 | FTE Enrollment Report | 12 |
| March<br>1 | SPD-1 | SPD Five-Year Goals Plan | 19 |
| April<br>15 | CO-2 (OEFC 352) | Six-Month Capital Outlay Encumbrance Projection and Request for Encumbrance Authorization | Appendix B |
| 15 | CO-3 (OEFC 351) | Quarterly Report: Capital Outlay Funds | Appendix B |
| 20 | | Quarterly Financial Reports | 5 |
| May<br>30 | ITV-1 (CE 126) | Scheduling of Videotapes | Appendix B |
| June<br>1 | OB | Operating Budget | 3 |
| 15 | AA-2 | Placement and Follow-Up (Completer/ Leaver Follow-Up - VEDS) | 16 |
| 15 | AA-3 | Follow-Up and Withdrawal Studies/ Program Evaluation | 16 |
| 15 | AA-4 | Employer Rating Summary (VEDS) | 16 |
| 15 | AA-5 | Field of Employment and Average Salary (VEDS) | 16 |
| 30 | CO-9 (OEFC 207) | Comprehensive Safety Inspection | Appendix B |
| As Req. | CO-4 (OEFC 217) | Project Priority List | Appendix B |
| As Req. | CO-5 (OEFC 218) | Site Inspection | Appendix B |
| As Req. | CO-6 (OEFC 093) | Request for Education Plant Survey | Appendix B |

## DIVISION OF COMMUNITY COLLEGES

## CHART OF REPORTS (Continued)

| DUE DATE | REPORT | REPORT TITLE | SECTION |
|---|---|---|---|
| June (Continued) | | | |
| As Req. | CO-7 (OEFC 092) | Application for Advance Funding | Appendix B |
| As Req. | CO-8 (SCOA-1) | Local Resolution Requesting Issuance of State Board of Education Capital Outlay Bonds | Appendix B |
| As Req. | VA-1 | State Approval as Training Agency for Veterans | Appendix B |
| As Req. | | School Center Report | Appendix B |
| As Req. | 22-8723 | Occupational Graduate Employment Report | Appendix B |

## DIVISION OF COMMUNITY COLLEGES

## CHART OF REPORTS (Alpha List)

| REPORT | REPORT TITLE | DUE DATE OR FREQUENCY |
|---|---|---|
| AA-1 | Annual Enrollment Headcount Reports | 9-15 |
| AA-2 | Placement and Follow-Up (Completer/ Leaver Follow-Up - VEDS) | 6-15 |
| AA-3 | Follow-Up and Withdrawal Studies/ Program Evaluation | 6-15 |
| AA-4 | Employer Rating Summary (VEDS) | 6-15 |
| AA-5 | Field of Employment and Average Salary (VEDS) | 6-15 |
| AFR | Annual Financial Report | 8-15 |
| CA-1 | Identification of Operating Expenditures by Fund | 11-1 |
| CA-2 | Direct Cost of Primary & Support Programs and Personnel Resources | 11-1 |
| CA-3 | Full Cost of Instruction | 11-1 |
| CI-1 | Community Instructional Services Report | 10-25 |
| CO-1 (OEFC 304) | Annual and Five-Year Capital Projects Program Plans | 11-1 |
| CO-2 (OEFC 352) | Six-Month Capital Outlay Encumbrance Projection and Request for Encumbrance Authorization | 7-15, 10-15, 1-15, 4-15 |
| CO-3 (OEFC 351) | Quarterly Report: Capital Outlay Funds | 7-15, 10-15, 1-15, 4-15 |
| CO-4 (OEFC 217) | Project Priority List | As Required |
| CO-5 (OEFC 218) | Site Inspection | As Required |
| CO-6 (OEFC 093) | Request for Education Plant Survey | As Required |
| CO-7 (OEFC 092) | Application for Advance Funding | As Required |
| CO-8 (SCOA-1) | Local Resolution Requesting Issuance of State Board of Education Capital Outlay Bonds | As Required |

## DIVISION OF COMMUNITY COLLEGES

## CHART OF REPORTS (Alpha List)

| REPORT | REPORT TITLE | DUE DATE OR FREQUENCY |
|---|---|---|
| CO-9 (OEFC 207) | Comprehensive Safety Inspection | 6-30 |
| DVE 393 | Annual Cosmetology Education Report | 1-31 |
| EA-3 | Annual Report of Developmental and Community Instructional Services Enrollment | 9-15 |
| EF-1 | Opening Fall Enrollment | 10-1 |
| ESE 333 | Adult Education Annual Report | 8-15 |
| FA-2 | FTE Enrollment Report | 10-1 |
| FA-3 | FTE Enrollment Report | 2-15 |
| FA-4 | FTE Enrollment Report | 9-15 |
| FE-1 | Fall Enrollment Headcount by Age Groups | 2-1 |
| FW-1 | Student Fees and Fee Waiver Report | 10-1 |
| HEGIS 2300-1 | Institutional Characteristics of Colleges and Universities | 7-1 |
| HEGIS 2300-2.1[1] | Degrees and Other Formal Awards Conferred | 9-15 |
| HEGIS 2300-2.3[1] | Fall Enrollment & Compliance Report | 10-1 |
| HEGIS 2300-2.8[2] | Residence and Migration of College Students | 11-1 |
| HEGIS 2300-3 | Salary, Tenure and Fringe Benefits of Full-Time Instructional Faculty | 10-15 |
| HEGIS 2300-4 | Financial Statistics of Institutions of Higher Education | 10-15 |
| HEGIS 2300-5[2] | College and University Libraries | 9-15 |
| HEGIS 2300-7[2] | Inventory of College and University Physical Facilities | 9-15 |
| HEGIS 2300-8[2] | Adult/Continuing Education: Non-Credit Activities | 8-15 |

## DIVISION OF COMMUNITY COLLEGES

## CHART OF REPORTS (Alpha List)

| REPORT | REPORT TITLE | DUE DATE OR FREQUENCY |
|---|---|---|
| ITV-1 (CE 126) | Scheduling of Videotapes | 5-30 |
| IU-1,2,3,4 | Facilities Inventory Updates | 7-15 |
| NCES 2404-1 | Teacher-Staff Report (VEDS) | 9-15 |
| NCES 2404-2 | Financial Status Report (FA-397) | 10-15 |
| OA-1 | Annual Report of Output | 10-25 |
| OA-2 | Acceleration Report | 10-25 |
| OB | Operating Budget | 6-1 |
| OCR A1b | New Hires in Institutions of Higher Education | 12-5 |
| OCR A2 | Employees of State Agencies of Higher Education | 12-5 |
| OCR A3 | Retirements, Resignations and Dismissals at Institutions of Higher Education | 12-5 |
| OCR A4 | Promotion of Employees in Institutions of Higher Education | 12-5 |
| OCR A5 | Composition of Governing Boards for Higher Education | 12-5 |
| OCR B1 | Applications, Acceptances and Actual Enrollment | 12-5 |
| OCR B3 | Financial Assistance to Students in Institutions of Higher Education | 12-5 |
| OCR EEO-6 | Higher Education Staff Information | 12-5 |
| SA-1 | Personnel and Salary Report | 10-15 |
| SA-2 | Salaries of Selected Positions | 10-15 |

## DIVISION OF COMMUNITY COLLEGES

## CHART OF REPORTS (Alpha List)

| REPORT | REPORT TITLE | DUE DATE OR FREQUENCY |
|---|---|---|
| SPD-1 | SPD Five-Year Goals Plan | 3-1 |
| SPD-2 | SPD Activity Evaluation | 9-10 |
| SPD-3 | Financial Report Summary | 9-10 |
| SU-1 | Space Utilization | 11-15 |
| VA-1 | State Approval as Training Agency for Veterans | As Required |
| 22-8723 | Occupational Graduate Employment Report | As Required |
|  | Feedback Report of Graduates | 11-1 |
|  | Quarterly Financial Reports | 10-20, 1-20, 4-20 |
|  | Program Budget | As Required |
|  | School Center Report | As Required |

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[1] Report completed by the Division of Community Colleges from information provided by the colleges.

[2] Not required on a regular basis.

# SECTION 2

# THE COMMUNITY COLLEGE INFORMATION CLASSIFICATION STRUCTURE (CCICS)

## Purpose of the Structure

The Community College Information Classification Structure (CCICS) is one of the most important characteristics of the Community College Management Information System. It is the integrating feature of the system which provides a thread of continuity required to interrelate various types of information. The structure is the common framework for classifying information by function and activity. Since there are twenty-eight (28) community colleges in Florida with various organizational structures and operational patterns, it is necessary to establish a standard structure as a communications base for the State-level information system. The use of the structure to group common functions and activities provides the necessary uniformity without impinging on or reducing the college's freedom of operation. The CCICS, therefore, provides a common basis for describing and communicating the functions and activities carried on in the Florida Community Colleges.

## Characteristics of the Structure

The following are the basic characteristics of the CCICS:

1. Classification of All Functions and Activities - The structure was designed to include all functions and activities carried on by the community colleges. It was organized so that each specific activity can be classified in only one component in each level of the structure.

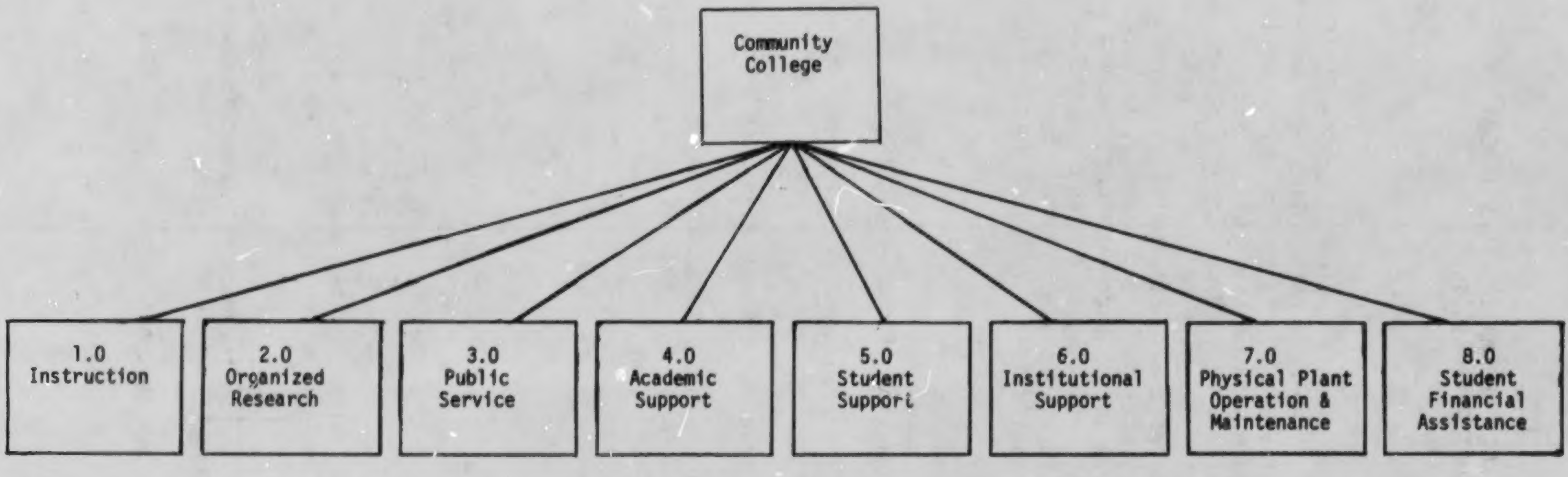
2. Hierarchical Structure - The CCICS was constructed as a multi-level structure to provide a basis for classifying, grouping, and summarizing information. It was felt that the State-level information base should not include detailed data. However, there should be a structure which would provide for standard data elements in instructional data bases which can be aggregated to an appropriate level for routine reports and special requests.

3. Integrated Information - One of the most important aspects of a good management information system is the ability to interrelate data or information. The CCICS provides a mechanism for relating the various categories of information (e.g., courses, programs, costs, expenditures, facilities, etc.) to the function and activity groups of the structure. Furthermore, the CCICS is integrated with the Statewide Course Numbering System to improve uniformity of the reporting function.

4. Standard Terminology and Definitions - Standard terminology and definitions are used to describe and define each component in the structure. This insures comparable classification and aggregation of data.

The chart on the following page shows the top two levels in the CCICS: the Function and Subfunction levels.

2.2


Community College
1.0 Instruction
2.0 Organized Research
3.0 Public Service
4.0 Academic Support
5.0 Student Support
6.0 Institutional Support
7.0 Physical Plant Operation & Maintenance
8.0 Student Financial Assistance

1.10 Advanced & Professional
1.20 Occupational
1.30 Developmental
1.40 Community Instructional Service

3.10 Community Services

4.10 Learning Resources
4.40 Instructional Computing Service
4.50 Ancillary Op.
4.60 Academic Adm.
4.70 Course & Curriculum Development
4.80 Academic Professional Personnel Development

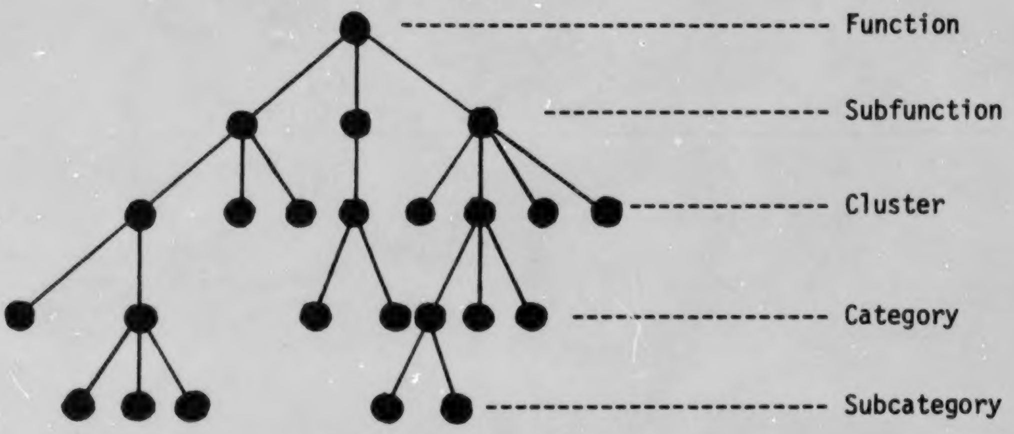
5.10 Social & Cult. Development
5.20 Organized Ath.
5.30 Counseling & Advisement
5.40 Placement Servs.
5.50 Financial Aid Adm.
5.60 Student Records & Admissions
5.70 Health Services
5.80 Services for Special Students
5.90 Student Service Administration

6.10 Executive Management
6.20 Fiscal Operations
6.30 General Admin. & Logistical Services
6.60 Administrative & Support Staff Service
6.70 Community Relations

## Coding for the Structure

The Information Classification Structure provides a hierarchical arrangement for classifying the functions and activities of the college. The following shows the five (5) basic levels of the structure:

Hierarchical Structure (Example)



An eight digit code is used to identify and classify information at the appropriate level in the structure. The following shows the arrangement of digits for each level:

Coding Structure

| Function | Sub-Function | Cluster | Category | | Subcategory | | Special I.D. |
|---|---|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |

The following describes the general coding standards for each type of information:

1. Student Information - Information on students is related to courses/disciplines and instructional programs.

    A. Course/Discipline Coding - Each course (credit and non-credit) offered by a college must be classified and coded according to its subject matter content. It should be noted that the course number is not included as part of the ICS since it is the standard course number assigned by the Statewide Course Numbering System.

Examples:

| Code | Level | Component |
|---|---|---|
| 1. | Function | Instruction |
| 1.1 | Subfunction | Advanced and Professional |
| 1.11 | Cluster | Natural & Physical Sciences |
| 1.11.19 | Category | Physical Science |
| 1.11.1902 | Subcategory | General Physics Course(s) |
| 1. | Function | Instruction |
| 1.2 | Subfunction | Occupational |
| 1.23 | Cluster | Health |
| 1.23.01 | Category | Dental |
| 1.23.0102 | Subcategory | Dental Hygiene Course(s) |

B. Instructional Programs - The educational objective of each student in an Occupational or Advanced and Professional program must be coded according to the ICS. The following examples illustrate the proper use of this classification and coding scheme:

| Code | Level | Component |
|---|---|---|
| 1. | Function | Instruction |
| 1.1 | Subfunction | Advanced & Professional |
| 1.11 | Cluster | Natural & Physical Sciences |
| 1.11.01 | Category | Agriculture (Optional) |
| 1.11.0114 | Subcategory | Forestry (Optional) |
| 1. | Function | Instruction |
| 1.2 | Subfunction | Occupational |
| 1.23 | Cluster | Health |
| 1.23.01 | Category | Dental |
| 1.23.0102 | Subcategory | Dental Hygiene Program |
| 1.23.0102.0 | Special ID Used to identify each unique program if the first 7 digits are the same. | |

The detailed classification structure for courses and instructional programs is presented in Appendix A.

2. Personnel Information - This type of information is related to both resource utilization and salaries.

A. Personnel resource utilization information is derived from an analysis and distribution of workloads. One dimension of the distribution is to the components of the ICS. For example:

Distribution of a faculty workload assignment,

| | | |
|---|---|---|
| 1. | Function | Instruction |
| 1.1 | Subfunction | Advanced & Professional |
| 1.11 | Cluster | Natural & Physical Science |
| 1.11.04 | Category | Biological Science |

and - - - - - - - -

| | | |
|---|---|---|
| 1. | Function | Instruction |
| 1.2 | Subfunction | Occupational |
| 1.23 | Cluster | Health |
| 1.23.03 | Category | Nursing |

The above illustrates two things:

(1) The distribution of a faculty workload may be to different subfunctions, clusters, and categories.

(2) The difference in the level of detail which is required for different types of information. The category level is the lowest level required for personnel resource information.

Another example is the distribution of an individual workload for the non-instructional functions:

| | | |
|---|---|---|
| 5. | Function | Student Services |
| 5.1 | Subfunction | Social & Cultural Development |

and - - - - - - -

| | | |
|---|---|---|
| 5.3 | Subfunction | Counseling & Advisement |

Again this illustrates an even higher level of aggregation which is used when classifying non-instructional personnel activity assignments in the ICS.

B. Individuals and their respective salaries are not distributed to the ICS, rather they are identified only by personnel categories which reflect their primary assignment. However, salary expenditures are distributed to the ICS in the personnel resource analysis distribution illustrated above.

3. Financial and Cost Information - The Accounting Manual for Florida's Public Community Colleges - 1974 requires the consistent classification of activities (and organizational units) by function. This provides comparability at a high level of aggregation for both Budget and Annual Financial Report information. The General Ledger classification code provides a scheme for classifying expenditure and revenue information by type of transaction or account. For detailed classifying and coding instructions related to the financial reports (Annual Financial Report, Operating Budget, Quarterly Financial Reports, etc.) refer to the Accounting Manual for Florida's Public Community Colleges.

Cost Analysis Information goes to a much greater level of detail in the ICS than does the financial information. The basic unit costed in the analysis is the individual course. This makes it necessary that each course offered by a college carry the full seven digits of the ICS so that the cost data can be aggregated to higher levels. It is also necessary to associate (and crosswalk) organizational and personnel activities to the ICS in order to distribute expenditures to the appropriate cost centers in the ICS.

4. Facilities Information - An inventory of college sites, facilities, and rooms (space) is maintained by the Division of Community Colleges. The ICS code is used to identify the function for which the space is used; e.g.,

   A. Biology Laboratory - 1.11.0400
   B. Dental Hygiene Lab - 1.23.0102
   C. General Instructional Classroom - 1.00.0000
   D. Library - 4.10.0000
   E. Receiving Room - 6.40.0000

   It should be noted that one additional code is used when classifying facilities. The code 5.0 is used for facilities used by auxiliary enterprises; e.g., bookstore, food services, etc.

   The ICS code, along with the room use code, provides a means of classifying all types of space to an appropriate level of detail. An ICS code is not needed for site and facility records.

# The Community College Information Classification Structure

## Relationship of CCICS with Statewide Course Numbering System

The Statewide Course Numbering System (CNS) has been developed as a vehicle to designate Advanced and Professional (A & P) and Occupational Courses for the community colleges. The determination of this classification is made by the Division of Community Colleges and communicated to the colleges in the form of hard copy printouts. These printouts identify Community College A/O Code and HEGIS (Advanced and Professional (A & P) courses) or USOE Number (Occupational Courses) for each community college course in the CNS. By using this method to classify A & P and Occupational courses, consistency in classification will be achieved. The same course taught in several different community colleges will carry the same A & P or Occupational designation, HEGIS or USOE number.

Every course has been identified with "A" or "O" to designate A & P or Occupational courses. The A or O designation is used to determine whether the HEGIS Number or USOE Number will be used in the translation to the ICS code. If the Community College A/O code is "A", the HEGIS Number will be used in the translation; if the Community College A/O code is "O", the USOE Number will be used in the translation.

Determining ICS Codes for Advanced and Professional Courses (A). Advanced and Professional courses will use the HEGIS Number as the basis for crosswalking to the seven-digit ICS code in the CCMIS reporting system. Using the following table, the full seven-digit ICS code can be constructed using the four-digit HEGIS number in the Statewide Course Numbering System.

| ICS Cluster | Add HEGIS Number | ICS Code |
|---|---|---|
| 1.11 Natural and Physical Science | 01XX Agriculture and Natural Resources | 1.11.01XX |
| | 02XX Architecture and Environmental Design | 1.11.02XX |
| | 04XX Biological Sciences | 1.11.04XX |
| | 09XX Engineering | 1.11.09XX |
| | 12XX Health Professions | 1.11.12XX |
| | 19XX Physical Sciences | 1.11.19XX |
| 1.12 Fine and Applied Arts | 10XX Fine and Applied Arts | 1.12.10XX |
| 1.13 Letters and Foreign Languages | 11XX Foreign Languages | 1.13.11XX |
| | 15XX Letters | 1.13.15XX |
| 1.14 Education | 08XX Education | 1.14.08XX |

| ICS Number | Add HEGIS Number | ICS Code |
|---|---|---|
| 1.15 Business and Management | 05XX Business and Management | 1.15.05XX |
| 1.16 Mathematics and Computer Science | 07XX Computer and Information Science | 1.16.07XX |
| | 17XX Mathematics | 1.16.17XX |
| 1.17 Social Sciences | 03XX Area Studies | 1.17.03XX |
| | 20XX Psychology | 1.17.20XX |
| | 22XX Social Sciences | 1.17.22XX |
| 1.18 Other Disciplines | 06XX Communications | 1.18.06XX |
| | 13XX Home Economics | 1.18.13XX |
| | 14XX Law | 1.18.14XX |
| | 16XX Library Science | 1.18.16XX |
| | 18XX Military Science | 1.18.18XX |
| | 21XX Public Affairs | 1.18.21XX |
| | 23XX Theology | 1.18.23XX |
| | 49XX Interdisciplinary | 1.18.49XX |

As examples, the following Advanced and Professional courses will be translated into the ICS as:

| Institutional Course Number | Institutional Course Title | HEGIS | ICS |
|---|---|---|---|
| SPA 0101 | Elementary Spanish | 1105 | 1.13.1105 |
| HUM 0287 | Music Skills | 1004 | 1.12.1004 |
| MAT 0230 | Calculus | 1701 | 1.16.1701 |

Determining ICS Codes for Occupational Courses (O). Occupational courses must use the USOE Number as the basis for crosswalking to the seven-digit ICS code in the CCMIS reporting system. It may be noted that the USOE Number is a ten-digit number. The four rightmost positions of USOE Number are zero and therefore insignificant for crosswalking purposes. Using the following table, the seven-digit ICS Code can be constructed from the ten-digit USOE Number in the Statewide Course Numbering System. Beginning in the leftmost position of USOE Number, the first two digits are translated into the three-digit ICS cluster identification. The next four USOE digits are used as is; the last four digits are ignored in the translation. The ten digits of USOE Number represent Handbook VI equivalents in most cases.

(Translate the first two USOE digits into the three digit ICS cluster and use the next four USOE digits as is.)

| ICS Cluster | USOE Number | | ICS Code |
|---|---|---|---|
| 1.21 Agriculture | 01XXXXXXXX | Ignore | 1.21.XXXX |
| 1.22 Distributive | 04XXXXXXXX | | 1.22.XXXX |
| 1.23 Health | 07XXXXXXXX | | 1.23.XXXX |
| 1.24 Home Economics | 09XXXXXXXX | | 1.24.XXXX |
| 1.25 Office | 14XXXXXXXX | | 1.25.XXXX |
| 1.26 Trade and Industrial | 17XXXXXXXX | | 1.26.XXXX |
| 1.27 Public Service | 27XXXXXXXX | | 1.27.XXXX |

As examples, the following Occupational courses would translate into the ICS as:

| Institutional Course Number | Institutional Course Title | USOE | ICS |
|---|---|---|---|
| PLS 0175 | Turfgrass Management | 0105040000 | 1.21.0504 |
| SAM 0284 | Office Management | 1408000000 | 1.25.0800 |
| LAE 0262 | Police Operations | 2702010000 | 1.27.0201 |

Until such time as all community college courses are carried in the CNS, the colleges will continue to place those courses not in CNS into the CCICS structure, according to guidelines presented in this and other sections.

# The Community College Information Classification Structure

## Detail Definitions and Terminology

### 1.XX.XXXX Instruction

This function includes all formally organized activities designed for the purpose of transmitting knowledge, skills, and attitudes; i.e., activities carried out for the express purpose of eliciting some measures of "educational change" in a learner or group of learners.

### 1.1X.XXXX Advanced and Professional Instruction

This subfunction includes courses and instructional programs designed to provide the first two years of course work leading to an advanced or professional degree (bachelors, first professional, masters, etc.). It includes both the general education and specialized lower division courses necessary to complete a transfer degree program. It does not include non-credit courses, specifically designed compensatory (remedial) courses, or vocational and technical courses (see definition for Occupational Instruction).

The following coding standards apply to Advanced and Professional programs and courses.

Coding Instructional Programs: Each program of study (or degree tract) which provides the first two years of course work leading to an advanced and professional degree will be identified, classified, and coded according to the structure found in Appendix A, Part 1. Further, each student pursuing, or planning to pursue an advanced or professional degree will be identified with one of these programs based on their educational objective declaration at their most recent registration. One of the following two options will be used in program enrollment, placement, and follow-up reporting (AA Series) for Advanced and Professional Programs:

1. Use each of the nine clusters; i.e.,

   1.11 Natural and Physical Science
   1.12 Fine and Applied Arts
   1.13 Letters and Foreign Languages
   1.14 Education
   1.15 Business and Management
   1.16 Mathematics and Computer Science
   1.17 Social Sciences
   1.18 Other Degree Programs (as specified)
   1.19 General Degree Transfer

2. Use the single cluster of General Degree Transfer (1.19) for all students in the A.A. degree program.

Although a college may use either of these two options, it is strongly urged that the first option be used. When option 1 above is used, those students pursuing an Associate in Arts transfer degree, but who have not chosen a major, should be placed in the cluster 1.19.XXXX General Degree Transfer.

Coding Courses - Each course offered by the college will be assigned the full 7 digit ICS code specified by the Division of Community Colleges.

The following illustrates the relationship between the clusters and categories (HEGIS Disciplines) for the Advanced and Professional Function:

| Coding | Clusters/Categories |
|---|---|
| 1.11.XXXX | Natural and Physical Science |
| 1.11.01XX | Agriculture & Natural Resources |
| 1.11.02XX | Architecture & Environmental Design |
| 1.11.04XX | Biological Science |
| 1.11.09XX | Engineering |
| 1.11.12XX | Health Professions |
| 1.11.19XX | Physical Sciences |
| 1.12.XXXX | Fine and Applied Arts |
| 1.12.10XX | Fine and Applied Arts |
| 1.13.XXXX | Letters and Foreign Languages |
| 1.13.11XX | Foreign Languages |
| 1.13.15XX | Letters |
| 1.14.XXXX | Education |
| 1.14.08XX | Education |
| 1.14.0835(1) | Physical Education |
| 1.15.XXXX | Business and Management |
| 1.15.05XX | Business and Management |
| 1.16.XXXX | Mathematics and Computer Science |
| 1.16.07XX | Computer and Information Science |
| 1.16.17XX | Mathematics |
| 1.17.XXXX | Social Sciences |
| 1.17.03XX | Area Studies |
| 1.17.20XX | Psychology |
| 1.17.22XX | Social Sciences |
| 1.18.XXXX | Other Disciplines |
| 1.18.06XX | Communications |
| 1.18.13XX | Home Economics |
| 1.18.14XX | Law |
| 1.18.16XX | Library Science |
| 1.18.18XX | Military Science |
| 1.18.21XX | Public Affairs |
| 1.18.23XX | Theology |
| 1.18.49XX | Interdisciplinary |
| 1.19.XXXX | General Degree Transfer |

(1) This code is used only when classifying physical education facilities and space requirements.

## 1.2X Occupational Instruction

This subfunction includes all courses (credit and non-credit) and instructional programs designed to prepare persons for an occupation without subsequent training or education in an institution of higher education or to provide courses to upgrade job related skills. Many of the courses classified as occupational instruction are transferable to a State university to apply toward a bachelors degree; however, they are placed in this subfunction since they are required for an occupational degree or certificate because of their specialized content. This classification standard was adopted to provide consistent classification of those courses which serve both a transfer and occupational preparatory purpose.

The following coding standards apply to occupational programs and courses:

When classifying and reporting occupational instructional programs, all eight digits of the ICS code are used to specifically identify each occupational program; e.g.,

| | |
|---|---|
| Automotive Mechanics | 1.26.0302.0 |
| Law Enforcement Training | 1.27.0201.0 |
| Forestry | 1.27.0700.0 |

The eighth digit is used only to distinguish between two programs that have the same coding for the first seven digits. This usually occurs in those cases where there are degree and certificate tracks for the same program.

The following seven clusters are used to further subdivide the occupational subfunction:

| | |
|---|---|
| 1.21 | Agriculture |
| 1.22 | Distributive |
| 1.23 | Health |
| 1.24 | Home Economics |
| 1.25 | Office |
| 1.26 | Trade and Industrial |
| 1.27 | Public Service |

The basic classification logic was adapted from USOE Handbook VI. However, instead of a category entitled "Technical" there is one called "Public Service." This provides a functional classification since "Technical" is considered a level of education. For the detailed classification and coding of the categories and subcategories refer to Appendix A.

Although not a part of the basic ICS coding scheme, a special coding consideration for this subfunction provides that each occupational program of study (instructional program) and/or course will be identified according to the following categories and definitions:

1. Post-secondary Technical (courses and programs of study) - This includes programs of study and their related courses designed to prepare persons for employment at the technical level which is between that of the skilled and the professional. These are usually two-year programs of study made up of college level credit courses which are, for the most part, transferable.

2. Post-secondary Skilled/Semi-Skilled (courses and programs of study) - This includes programs of study and their related courses designed to prepare students for employment at a semi-skilled or skilled level which is between that of the unskilled and the technican. These are usually clock hour or institutional credit programs and courses similar to those offered in area vocational schools.

3. Supplementary (courses) - A course that is organized for the purpose of upgrading persons who are currently or who have been previously employed in an occupational field or as a homemaker. This should not include courses which are organized as a unit of a preparatory program of studies.

4. Apprenticeship (courses) - A course providing occupational preparation for skilled trades as authorized by State and Federal legislation and usually conducted under the auspices of a joint apprenticeship committee representing labor, management, and the school.

## 1.3X Developmental Instruction

This subfunction includes the courses and instructional programs designed to prepare persons for college entry. It also includes courses considered basic and general education at the elementary and high school level. It should not include occupational courses.

It includes the following clusters:

1.31 Compensatory Instruction

This includes courses and/or programs designed to meet the academic and personal needs of educationally disadvantaged students. These activities are intended to bridge the gap between secondary school and college for students with specifically identified deficiencies.

1.32 Adult Elementary and Secondary Instruction

This includes instructional activities in the following areas:

1.32.1 Adult Basic Education

1.32.2 Adult General Education

1.32.3 Literacy

1.32.4 High School Completion for Adults

1.32.5 Preparation for the General Education Development Test (GED)

## 1.4X Community Instructional Services

This subfunction includes non-credit instructional courses designed to meet community needs or to provide recreational or leisure-time activities. Occupational non-credit (supplemental) courses should not be classified in this subfunction, rather they should be placed in the appropriate occupational category.

The following two clusters are used to further classify community instructional services:

### 1.41 Citizenship Instruction

This cluster includes courses designed to solve significant community problems identified by the local district board of trustees. These problems should be categorized using the following definitions:

1.41.1 Environmental problems are those which relate to the development, use and conservation of natural resources.

1.41.2 Problems relating to Health are based on provisions for the development and maintenance of a physical and emotional health of the people.

1.41.3 Safety problems are those which deal with the protection of the people against natural and man-made hazards.

1.41.4 Human Relations problems relate to the interaction of groups of people in the community and to the need for the development and/or maintenance of a common set of values and aspirations.

1.41.5 Governmental problems are those which relate to the organization and operation of agencies needed to maintain services to the people.

1.41.6 Problems related to Child Rearing are based on provisions in the community for rearing children and for the education of children, youth, and adults.

1.41.7 Consumer Economics problems relate to the consumption of goods and services.

For a more detailed discussion of the terminology and procedures related to offering citizenship courses, refer to "Guidelines for Non-Credit Citizenship Instruction (1.4100)" distributed to the colleges on June 20, 1975.

### 1.42 Recreational and Leisure Time Instruction

This cluster includes courses designed to provide non-credit recreational and leisure time instruction to members of the community. For a detailed discussion of the terminology and procedures related to offering recreational and leisure time courses, refer to "Guidelines for Non-Credit Recreational and Leisure Time Instruction (1.4200)" distributed to the colleges on June 20, 1975.

## 1.9X Other Personal Objectives

These are persons from the college community who take courses for various reasons other than to complete a degree or certificate program offered by the college. With the emphasis on program enrollment, completion, placement, and follow-up it is necessary for colleges to identify students with the program in which they enroll. For those persons who do not intend to complete a program, it is necessary to establish a category of "Other Personal Objectives" so they can be reported as part of the clientele a college serves, but are not included in specific programs for withdrawal, placement, and follow-up studies.

This subfunction is established to account for students who do not intend to complete an instructional program offered by the college, but who are taking credit courses to satisfy their personal objectives. An example would be a teacher taking a course to be used for renewal of his certificate, in which case the teacher is not seeking to complete degree or certificate requirements.

This subfunction is used only when accounting for students by instructional program. It is not applicable to the classification of courses or disciplines.

## 2.X Organized Research

This function includes contract and grant research projects which are established to investigate a specific scope as defined by the commissioning agency to produce research outcomes that may include creation of new knowledge, reorganization of knowledge, and application of knowledge. However, this function does not include institutional research, operations research, curriculum development, or systems development activities.

## 3.X Public Service (Other than Instruction)

This function includes community services which are designed to improve the quality of community life or assist in the identification and solution of community problems. These community services may include but are not limited to library and clinical services for citizens not enrolled at the college; consultative and technical services provided to community groups; cultural enrichment programs; public television; and community use of facilities. This function does not include any instructional courses which serve the community. These courses should be classified as Community Instructional Services (1.4X).

## 4.X Academic Support

This function includes activities that directly support, supplement, or augment the Instructional function.

Subfunctions:

4.1 Learning Resources
4.4 Instructional Computer Services
4.5 Ancillary Operations
4.6 Academic Administration
4.7 Course and Curriculum Development
4.8 Professional Personnel Development

### 4.10 Learning Resources

Included in this subfunction are activities which provide for the collection, storage, distribution, and use of instructional materials and equipment. It includes:

4.11 Libraries - consists of activities that directly support the operation of a cataloged collection of published materials.

4.12 Audio-Visual Services - includes activities associated with providing audio and visual materials, media, and equipment in support of the instructional program.

4.13 Museums and Galleries - includes activities established to provide services related to the collection, preservation, and exhibition of historical materials, art objects, scientific displays, etc.

4.14 Planetariums

4.15 Auditoria - including performing arts auditoria and teaching auditoria.

This subfunction should include the centralized activities of learning resources for instructional purposes. If a library, audio-visual laboratory, or exhibit is established and maintained by a specific instructional area (discipline, department, division), it should be accounted for in the Instructional function.

### 4.40 Academic Computing Support

This subfunction includes general computing support to the Instructional Programs of the College. It should not include any service which can be directly assigned to a course or program of courses (i.e., Data Processing). Administrative Data Processing (6.3) shall include services such as scheduling, room assignments, etc., even if they are generated from the campus Academic Offices. Only individual student centered services shall be included in 4.4.

### 4.50 Ancillary Operations

This subfunction includes activities of instructional organizational units which provide training or work experience for students, as well as services to the community.

Examples of ancillary operations are:

Automobile Repair Shop
Dental Hygiene Clinic
Cosmetology Services

The costs of supporting these special services should be lodged in this subfunction for the Direct Cost Study and allocated to the specific set of courses which they support for the Full Cost Study.

### 4.60 Academic Administration

This subfunction includes academic, administrative, and managerial activities of offices and positions with college or campus-wide responsibilities. It should include the offices and positions of Academic Vice-Presidents, Academic Deans, Deans of Instruction, Dean of Continuing Education, Dean of Occupational Programs, etc. It should not include departmental or divisional administrative activities related to specific instructional organizational units since provision is made to account for these activities in the Instruction function. It should not include offices or positions responsible for curriculum planning and development. These activities should be classified in 4.70 Course and Curriculum Development.

### 4.70 Course and Curriculum Development

This subfunction includes activities related to designing courses, developing course materials, planning and implementing programs, and evaluating programs (including follow-up activities). It does not include a faculty member's time associated with preparing for or conducting existing courses. It is, therefore, the resources and cost of development, rather than maintenance of existing courses and curricula. However, when a major revision is made to existing course materials, or the mode in which such materials are presented is significantly changed, such costs should be identified with the subfunction.

### 4.80 Academic Professional Personnel Development

This subfunction includes activities related to the development and improvement of the college's instructional professional staff. It would include activities such as in-service training programs, sabbatical leaves, training institutes, seminars, workshops, etc.

## 5.X Student Support

This function includes those activities provided by the college to assist and provide services for current and potential students.

Subfunctions:

5.1 Social and Cultural Development
5.2 Organized Athletics
5.3 Counseling and Advisement
5.4 Placement Services
5.5 Financial Aid Administration
5.6 Student Admissions and Records
5.7 Health Services
5.8 Services for Special Students
5.9 Student Service Administration

Auxiliary service facilities (e.g., bookstore, food service space, etc.) are classified and coded at the functional level - 5.0.

### 5.10 Social and Cultural Development

This subfunction includes activities related to the students' social and cultural development outside of the context of the formal instructional program. Objectives of this subfunction usually focus on personal hygiene, participatory recreational activities, involvement in civic affairs, and appreciation of various artistic and communication forms. It includes such activities as:

5.11 Student Activities; clubs, newspapers, etc.
5.12 Cultural Events; conferences, lectures, convocations, etc.
5.13 Student Organizations
5.14 Recreational Activities
5.15 Intramural Sports

### 5.20 Organized (Inter-collegiate) Athletics

This subfunction includes activities established for the purpose of competing with other colleges in basketball, baseball, track, swimming, tennis, golf, volleyball, etc.

### 5.30 Counseling and Advisement

This subfunction includes activities such as counseling students and parents, evaluating student abilities (testing), assisting students in career planning and goal setting, and assisting students in personal and social adjustment and development. It should also include related types of activities such as orientation, career laboratories, and career days. It should include centralized advisement activities if they are made available to students.

## 5.40 Placement Services

This subfunction includes activities related to placing students in jobs or in institutions to continue their education. It should include the services for students that completed programs, as well as those still enrolled in the college.

## 5.50 Financial Aid Administration

This subfunction includes activities established to administer the financial aid program of the college. It does not include revenue or expenditures for student loans or scholarships.

## 5.60 Student Records and Admissions

This subfunction includes activities related to developing, processing, maintaining, and distributing student records. It includes:

- Admissions
- Registration
- Records
- Transcripts
- Transfer Evaluation
- Degree Certification
- Statistics

## 5.70 Health Services

This subfunction includes activities established to provide clinical and other health services to students.

## 5.80 Services for Special Students

This subfunction includes activities established to provide non-instructional services to students with special needs or problems. It includes services for veterans, foreign students, and disadvantaged or handicapped students. It does not include financial aid or compensatory instructional activities.

## 5.90 Student Service Administration

This subfunction includes activities established to administer the student service function. Include in this subfunction those administrative offices and positions with college or campus-wide management responsibilities; e.g., Vice-Presidents of Student Services, Deans of Student Personnel Services, Directors of Student Services, etc.

## 6.X Institutional Support

This function includes those activities within the institution that provide support to the other functions and departments.

Subfunctions:

- 6.1 Executive Management
- 6.2 Financial Management and Operations
- 6.3 General Administrative and Logistical Services
- 6.6 Administrative and Support Staff Services
- 6.7 Community Relations

### 6.10 Executive Management

This subfunction includes activities established for college-wide policy development, planning, management, institutional research, and evaluation. It includes the following activities:

- 6.11 College-wide management
  - 6.11.1 District Board of Trustees
  - 6.11.2 President
  - 6.11.3 Assistant to the President
  - 6.11.4 Executive Vice President(s)
  - 6.11.5 Chief Campus Administrators in multi-campus colleges (vice-presidents, provosts, etc.)
  - 6.11.6 Equal Access, Equal Opportunity, Equal Employment Officer
- 6.12 Educational planning and development
  - 6.12.1 Institutional research
  - 6.12.2 Analytical studies
  - 6.12.3 Facilities planning
- 6.13 Legal services
- 6.14 College-wide planning and management committees, councils, or task forces
  - 6.14.1 Faculty senates
  - 6.14.2 Planning committees
  - 6.14.3 Administrative councils

## 6.20 Financial Management and Operations

This subfunction includes those activities related to the financial management and fiscal operations of the institution. It includes the following activities:

6.21 Financial management and control

- 6.21.1 Business officer (financial duties)
- 6.21.2 Comptroller
- 6.21.3 Internal auditing
- 6.21.4 Budget administration and control

6.22 Financial operations

- 6.22.1 Payroll operation
- 6.22.2 Bursar
- 6.22.3 Cashier
- 6.22.4 Disbursement
- 6.22.5 Accounting

6.23 Investment management

- 6.23.1 Cash flow management
- 6.23.2 Endowment management

6.24 Grants and contracts financial management

- 6.24.1 Grants management
- 6.24.2 Grants accounting

## 6.30 General Administrative and Logistical Services

This subfunction includes services and general institutional expense which cannot be logically classified in one of the other subfunctions; e.g.,

6.31 Administrative Data Processing (See 4.40 for Academic Computing Services)
6.32 Personnel Services

6.33 Logistical Services

6.33.1 Purchasing
6.33.2 Receiving
6.33.3 Shipping
6.33.4 Warehousing
6.33.5 Property Management
6.33.6 Mail and Distribution
6.33.7 Telephone and Telegraph Services
6.33.8 General Printing and Reproduction
6.33.9 Campus Transportation (inc. Motor Pool)
6.33.10 Parking and Parking Space Management

6.34 Other general expense which cannot be distributed to a specific function or subfunction; e.g., business hospitality, organizational memberships, general insurance (other than property), etc.

## 6.60 Administrative and Support Staff Services

This subfunction includes activities related to administrative and support staff development, improvement, and general services. It includes:

6.61 In-Service Training
6.63 Sabbatical Leaves (administrative and support staff only)
6.63 Training Institutes, etc.
6.64 Staff Dining Rooms, lounges, etc.

## 6.70 Community Relations

This subfunction includes activities established to maintain relationships with the general community and the college's alumni. It includes the following activities:

6.71 Alumni relations
6.72 Community and/or public relation activities
6.73 Development (fund raising)

## 7.X Physical Plant Operation and Maintenance

This function includes activities established to provide services and support related to the operation, maintenance, and security of the physical plant. It includes the following activities:

| | |
|---|---|
| 7.10 | Building Maintenance |
| 7.20 | Grounds Maintenance and Operation |
| 7.30 | Custodial and Janitorial Services |
| 7.40 | Utilities |
| 7.50 | Plant Operational Expense (including insurance on buildings and equipment, electricity and water bills) |
| 7.60 | Repairs of Furniture and Equipment |
| 7.70 | Minor repairs, alterations or renovations of existing buildings financed from General Current Funds. |
| 7.80 | Police and Campus Security Services |

## 8.X Student Financial Assistance

This function includes financial assistance to students which is administered by the college. It includes only the expenditures recorded by the college for the purpose of assisting students financially. This function does not include the activities and costs associated with administering the student financial aid programs, rather they should be classified as 5.50 Financial Aid Administration.

- 8.10 Student Aid
    - 8.11 Loans
    - 8.12 Scholarships and grants
    - 8.13 Fee Waivers
- 8.20 Student Work-Study and Other Assistantship Programs

It should be noted that 8.X should not be used to classify space in the room inventory system.

# SECTION 3

## OPERATING BUDGET (OB)
## (and Amendments to the Operating Budget)

### General

The operating budget for community colleges consists of the following:

Exhibit A - Budget Summary for All Funds of the College
Exhibit B - Budget Justification
Exhibit C - Schedule of Revenues for Funds 1, 2, and 7
Exhibit D - Expenditures by Object for Funds 1, 2, and 7
Exhibit E - Expenditures by Organizational Unit - Fund 1
Exhibit F - Expenditures by Organizational Unit - Fund 2
Exhibit G - Analysis of Plant Fund Expenditures

### Forms

In order that all columnar headings for each exhibit may be presented on the same page without undue cramping, the budget should be prepared on 8½" x 14" pages with at least 3/4" margin on the left side to permit stapling or binding.

Each exhibit should be started on a new page and if continued, subsequent pages should be numbered accordingly. (Example: Exhibit 3, page 2 of 6)

The budget may be submitted on size 8½" x 11" by photographic reduction of the 8½" x 14' forms.

### Submission

Two copies of the budget must be submitted to the Director for review and approval. Both copies must be signed with the original or facsimile signature of the President. One approved copy will be returned to the college to be placed in the official files of the Board. Budgets are to be submitted no later than June 1 of each year.

### Exhibit A

This exhibit is a summary of the financial plan for each of the funds through which money resources will be received and disbursed throughout the budget year. The summaries for Funds 1, 2, and 7 will reflect the budgets as presented on succeeding exhibits for review and approval.

### Exhibit B

Information to support the budget request is presented on this exhibit. Include here any information that will be useful and informative to your Board and other reviewers or users of the budget document. Items I and III should be addressed if applicable. Additional data or explanation may be included in each item; however, the information requested in Items IV through X is the minimum that should be included.

## Exhibit C

This schedule presents the revenue and other income expected to be received for each of the budgeted funds. Revenue for the General Current and Restricted Current Funds is to be presented in comparative form.

Only transfers-in (General Ledger Codes 491 and 492) will be shown on this exhibit. Transfers-out will be shown on Exhibit D. Amounts shown should agree with the transfer amounts shown in Item VII, Exhibit B and the amounts shown on Exhibit A.

## Exhibit D

This exhibit is, like Exhibit C, comparative. Expenditures for the General Current and Restricted Current Funds are to be presented in comparative form. Expenditures of Staff and Program Development Funds will be budgeted and accounted for in the General Current Fund.

Transfers-out will be shown in this exhibit under Current Expenses. Mandatory and Non-Mandatory transfers should be shown separately in the category of "Other Current Charges." Specific general ledger codes have not been assigned; however, we suggest the use of codes in the 690-699 series.

Payments for Unemployment Compensation should be budgeted under Current Expenses. Again, no specific general ledger code has been assigned, but the use of a number which would place this item under the general category of "Services" is suggested.

## Exhibit E

The amounts budgeted for each organizational unit of the General Current Fund should be reported on Exhibit F. The totals for salaries, current expenses, and capital outlay should equal the expenditures requested on Exhibit D for the General Current Fund.

All Personnel Benefits including employee insurance, fee waivers, retirement, Social Security matching funds, etc., shall be budgeted to at least the function level on this exhibit. This may be done by allocation to individual departments or by adding a line in each function entitled "Unallocated Personnel Benefits."

The total salaries for each function should be computed as percent of total salaries for the entire fund. Likewise, current expense and capital outlay expenditures for each function should be computed as percent of the total current expense and capital outlay of the fund.

This schedule should reflect the estimated cost of operating each organizational unit of the General Current Fund. Therefore, if an individual works in two different organizational units, each organizational unit should budget for its portion of his salary.

Funds transferred from Fund 3 for expenditures in accordance with Section 6A-14.771, SBE Rules, are to be budgeted in Function 60, Institutional Support. The amount to be expended for hospitality of business guests will be budgeted as a separate organizational unit identified as "Business Hospitality."

Budgeted transfers need not be shown separately on this exhibit. However, approval of the budget includes approval of the budgeted transfers-out as recorded on Exhibit D. Actual transfers-out may not exceed the amount budgeted unless the budget is appropriately amended.

## Exhibit F

The amounts budgeted for each organizational unit of the Restricted Current Fund should be reported on Exhibit F. It should be prepared in the same manner as Exhibit E.

If work study salaries cannot be estimated with reasonable accuracy for each organizational unit, they may be budgeted as a separate organizational unit under Function 80, Student Aid, as "Unallocated Work-Study Salaries."

Expenditures budgeted for the Restricted Current Fund may be based on a reasonable estimate of resources expected to be received during the budget year. If the organizational unit is unknown, the expenditures should be budgeted to the organizational unit entitled "Unallocated Revenues" under Function 90. An explanation of the basis for the estimated expenditures must be shown on Exhibit B listing the types of projects and grants expected to be funded.

## Exhibit G

The Exhibit for Plant Fund Expenditures consists of three sections. Section A is a recapitulation of the Unexpected Plant Fund by source of funds. Section B presents the budgeted expenditures by project and by source of funds. Section C presents the budgeted expenditures by project by expenditure object and includes a column in which "total expenditures to date" are to be reported for each project.

If License Tag Fee fund (CO&DS), State Board of Education Bonds sold under the provisions of the School Capital Outlay Amendment (SBE Bonds) or Public Education Capital Outlay Funds (PECO) are to be expended for a construction project, the project must appear on the current Project Priority List (PPL) approved by the State Board of Education. The PPL project number and a short description must be included as shown on the SBE approved PPL. Projects to be financed from funds other than those listed above do not have to appear on the approved Project Priority List, but should be assigned a project number for control and identification.

Expenditures for projects to be funded with the proceeds of bonds sold by the State Board prior to 1968 on behalf of the local school district for college construction are limited to the amounts stated in the original or amended bond resolutions for each project. Therefore, budgeted expenditures from the proceeds, or any interest earned on the investment of the proceeds of that prior series of bonds must be further explained by a footnote to Section B as shown in the example on Exhibit G. The total "Amount Expended in Prior Years" plus the "Amount Budgeted" cannot exceed the "Amount Authorized in Bond Resolution."

Expenditures for projects to be funded with bonds sold by the State Board on behalf of the District Boards of Trustees subsequent to 1973 are not limited as to the amount for each project, but the projects budgeted for expenditure of those bond proceeds must be the same projects listed in the original bond resolution or in the resolution as appropriately amended.

Public Education Capital Outlay Funds (PECO) appropriated each year and each issue of State Board of Education Bonds is a separate source of funds and must be so identified in Sections A and B. The Public Education Capital Outlay Funds are identified by the year in which appropriated, thus funds appropriated in 1977 would be identified as PECO 1977. State Board of Education Bonds are identified by an alphanumeric code. Bonds sold in 1974, for example, are identified as series 74-A. Additional columns should be added to Sections A and B to provide space to identify separately the revenues and expenditures from each fund source.

In Section C refer to projects by project number only. The amounts budgeted for each expenditure object should be entered. The grand totals for each project code must equal the amounts for each expenditure code in the Unexpended Plant Fund column on Exhibit D.

Expenditures should not be budgeted in the Unexpended Plant Fund unless resources are on hand, an award or commitment has actually been received, or there is a reasonable basis for anticipating that the funds will be received.

______________________ College

Exhibit A

## BUDGET SUMMARY
## 19___ FISCAL YEAR

| | Current Fund Group | | |
|---|---|---|---|
| | Educational and General | | |
| | General Current Fund | Restricted Current Fund | Unexpended Plant Fund |
| Estimated Fund Balance, July 1, 19___ | XXX | XXX | XXX |
| Add: Revenues, Exclusive of Transfers | XX | XX | XX |
| Transfers In | XX | XX | XX |
| Proceeds from Bond Sales | | | XX |
| Total Available | XXX | XXX | XXX |
| Deduct: Budgeted Expenditures | XX | XX | XX |
| Transfers Out | XX | XX | XX |
| Estimated Fund Balance, June 30, 19___ | XXX | XXX | XXX |

APPROVED______________________________ ______________________
President Date

---

STATE OF FLORIDA, DEPARTMENT OF EDUCATION

APPROVED______________________________

Checked by______________________________ ______________________
Date

________________________ College Exhibit B

## BUDGET JUSTIFICATION

19___

I. New Programs

A. Instructional Programs

Comment on any new instructional programs or departments that are to be added this year--what and why. If none, write "not applicable" in this section.

B. Non-Instructional Programs

Comment on any new non-instructional programs or departments that are to be added this year--what and why. If none, write "not applicable" in this section.

II. Program Upgrading or Expansion

Comment on any instructional or non-instructional programs that are to be upgraded or expanded--what, reasons for, desired results, etc. If none, write "not applicable."

III. Program Reductions or Deletions

Comment on any instructional or non-instructional programs that are to be reduced in size or scope or to be deleted--what, reasons for, etc.

IV. Salary Analysis--General Current Fund Only

A. List new positions requested and why they are needed.

B. Salary expenditure analysis: (Example Analysis Below)

| | |
|---|---|
| Cost of continuing existing positions | $__________ |
| Cost of improving salary schedules | __________ |
| Cost of "lump-sum" salary items last year | __________ |
| Cost of "lump-sum" increases (decreases) | __________ |
| Cost of new positions requested | __________ |
| Cost of established positions being deleted | (__________) |
| Cost of personnel benefits | __________ |
| Total Budgeted Personnel Costs | $__________ |

V. Student Enrollment Information - Use the same format as the Enrollment Funding Data report FA-2, 3, 4.

Exhibit B (continued)

VI. Student Fee Charges

(Show in-state and out-of-state fee charges for full-time and part-time students and the amount charged or included for student activities)

VII. Transfer In and Out Information:

| Purpose of Transfer | Amount | Fund Number Transferred From | Fund Number Transferred To |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |

VIII. Federal Funds Information

| Name of Federal Agency | Name of Law and/or Title and Part | Purpose of Award | Amount of Award | Amount of Matching Required |
|---|---|---|---|---|

IX. Approved Salary Schedules for Academic, Administrative and Other Employees (Enclose Copy).

X. Currently Approved Project Priority List (Enclose Copy)

______________________College EXHIBIT C

SCHEDULE OF REVENUES
19___ FISCAL YEAR

| | General Current | | | Restricted Current | | | |
|---|---|---|---|---|---|---|---|
| | Actual Revenue | Current Estimate | Proposed | Actual Revenue | Current Estimate | Proposed | Unexpended Plant |
| **Student Fees** | | | | | | | |
| 401 In-State Matriculation | | | $ | | | $ | $ |
| 403 Out-of-State Tuition and Matriculation | | | | | | | |
| 404 Laboratory Fees | | | | | | | |
| etc. | | | | | | | |
| Total Student Fees | $ | $ | $ | $ | $ | $ | $ |
| **Support From Local Governments** | | | | | | | |
| 415 Grants & Contracts from Cities | | | $ | | | $ | $ |
| 416 Grants & Contracts from Counties | | | | | | | |
| Total Support from Local Governments | $ | $ | $ | $ | $ | $ | $ |
| **Support From State Government** | | | | | | | |
| 421 College Program Fund Appropriation | | | $ | | | $ | $ |
| 422 License Tag Fees Appropriation | | | | | | | |
| etc. | | | | | | | |
| Total Support from State Government | $ | $ | $ | $ | $ | $ | $ |
| **Support From Federal Government** | | | $ | | | $ | $ |
| **Gifts & Private Grants & Contracts** | | | | | | | |
| **Sales and Services** | The detail for these categories would be listed as above. | | | | | | |
| **Endowment Income** | | | | | | | |
| **Other Revenue** | | | | | | | |
| **Non-Revenue Receipts** | | | | | | | |
| Total Revenue | $ | $ | $ | $ | $ | $ | $ |

______________________ College

EXPENDITURES BY OBJECT

19___ FISCAL YEAR

EXHIBIT D

| | General Current | | | Restricted Current | | | |
|---|---|---|---|---|---|---|---|
| | Actual Expend. | Current Estimate | Proposed | Actual Expend. | Current Estimate | Proposed | Unexpended Plant |
| **Personnel Expenses** | | | | | | | |
| Salaries | | | | | | | |
| 501 Executive, Administrative, Managerial | | | $ | | | $ | $ |
| 520 Instructional | | | | | | | |
| 530 Other Professional | | | | | | | |
| 540 Technical, Clerical, Trade & Services | | | | | | | |
| Total Salaries | $ | $ | $ | $ | $ | $ | $ |
| Other Personal Services | | | | | | | |
| 550 Executive, Administrative, Managerial etc. | | | $ | | | $ | $ |
| Total Other Personal Services | $ | $ | $ | $ | $ | $ | $ |
| Personnel Benefits | | | | | | | |
| 591 Social Security Contributions etc. | | | $ | | | $ | $ |
| Total Personnel Benefits | $ | $ | $ | $ | $ | $ | $ |
| Total Personnel Costs | $ | $ | $ | $ | $ | $ | $ |
| Current Expenses | | | $ | | | $ | $ |
| Services<br>Materials & Supplies<br>Other Current Charges | The detail for these categories would be listed as above. | | | | | | |
| Total Current Expenses | $ | $ | $ | $ | $ | $ | $ |
| Capital Outlay | The detail for each General Ledger Code would be listed as above. | | | | | | |
| 710 Furniture and Equipment etc. | $ | $ | $ | $ | $ | $ | $ |
| Total Capital Outlay | $ | $ | $ | $ | $ | $ | $ |
| Total Expenditures | $ | $ | $ | $ | $ | $ | $ |

3.9

EXHIBIT E

## ____________________ COLLEGE
## EXPENDITURES BY ORGANIZATIONAL UNIT
## FOR 19___ FISCAL YEAR

### GENERAL CURRENT FUND

| | Personnel Costs | | Current Expenses | | Capital Outlay | | Total Expenditures | |
|---|---|---|---|---|---|---|---|---|
| | Amount | % of Total | Amount | % of Total | Amount | % of Total | Amount | % of Total |
| **Instruction** | $ | | $ | | $ | | $ | |
| Art Department | | | | | | | | |
| Business Administration | | | | | | | | |
| English | | | | | | | | |
| Humanities | | | | | | | | |
| Adult, Elementary & Secondary | | | | | | | | |
| Occupational Non-Credit Courses | | | | | | | | |
| etc. | | | | | | | | |
| Total Instruction | $ | % | $ | % | $ | % | $ | % |

The organizational units of each of the other sub-functions would be listed and totaled by sub-function and function.

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Total General Current Fund | $ | % | $ | % | $ | % | $ | % |

EXHIBIT F

### RESTRICTED CURRENT FUND

The same procedure as above would be followed for this budget, listing each organizational unit and getting totals for each function.

EXHIBIT G

## _______________ COLLEGE
## ANALYSIS OF PLANT FUND EXPENDITURES
## FOR 19_____ FISCAL YEAR

| A. Recapitulation by Source - Unexpended Plant | Total Funds | Local Funds | License Tag Fees | SBE Bonds* | PECO FUND |
|---|---|---|---|---|---|
| Beginning Balances, July 1, 19_____<br>Add Revenues<br>Bond Proceeds<br>Deduct Expenditures | $ | $ | $ | $ | $ |
| Ending Balances, June 30, 19_____ | $ | $ | $ | $ | $ |
| B. Expenditures by Project and Source<br>List each project by Project number and short description (Include PPL Project Number) | $ | $ | $ | $ | $ |
| Totals | $ | $ | $ | $ | $ |

| *Projects Funded by SBE Bonds Sold Prior to 1968 | Series | Project No. | Project Description | Amount Authorized In Bond Resolution | Amount Expended in Prior Years | Amount Budgeted |
|---|---|---|---|---|---|---|
| | | | | | | |

| C. Expenditures by Project and Type<br>List each project by project number | Expenditures to Date | Total | G.L. 710 | G.L. 730 | G.L. 750 | G.L. 770 | G.L. 790 |
|---|---|---|---|---|---|---|---|
| | $ | $ | $ | $ | $ | $ | $ |
| Totals | $ | $ | $ | $ | $ | $ | $ |

## Amendments to the Operating Budget

### When Budget Amendments Are Required

In accordance with the provisions of Rule 6A-14.713, Florida Administrative Code, community colleges are required to submit the following budget amendments for approval by the Commissioner of Education.

a. The transfer of appropriations from one fund to another.

b. The transfer of appropriations from one class of expenditure to another class within the same fund, such as capital outlay to salaries or salaries to current expense.

c. The reallocation of appropriations from one project to another in the Unexpended Plant Fund.

### Forms

Budget amendments should be prepared in the format shown on page 3.14. These forms should be reproduced at the college. A separate amendment is required for each fund. The format provides for amending fund balances, revenues and each class of expenditure. When proceeds from the sale of State Board of Education Bonds are being amended into the Unexpended Plant Fund it will be necessary to insert a line entitled "Bond Proceeds" in the revenue section of the form. Some colleges may find it desirable to show budgeted transfers separately in which case it is permissable to insert lines entitled "transfers" in the revenue and expense sections of the form. In order to maintain sequential continuity at both the local and state level, provision is made for resolution numbers and amendment numbers on the form. Each amendment including local amendments not requiring the Commissioner's approval, should be numbered consecutively in the space provided for "amendment number". In addition, amendments submitted to the Department of Education for approval should be identified by consecutive "resolution" numbers.

### Preparation of the Amendment

In preparing the amendment the amounts to be entered in the present budget column are the amounts shown in the latest approved budget or budget amendment for the fund being amended. The amounts of increases or decreases to any of the lines on the form should be entered in the appropriate columns and added to or subtracted from the amount in the present budget column. The resulting amount should be entered in the revised budget column. The amounts shown on the "Total to be Accounted For" line should always equal the amounts shown on the "Total Accounted For" line.

### Justification of Amendment

A concise statement of justification should be shown on, or attached to the amendment form. This statement should identify the source of revenues being budgeted and the purpose of the budgeted expenditures. When revenues from federal sources are being budgeted a copy of the grant approval letter is required to be submitted as part of this justification. The justification for all amendments to the Unexpended Plant Fund budget should include a revised copy of Exhibit G from the original operating budget. This form should show the amounts budgeted by project and source funds after the amendment.

## Submission

Two copies of each amendment, containing the original or facsimile signature of the President should be submitted to the Bureau of Financial and Business Services, Division of Community Colleges, Florida Department of Education. One copy of the amendment will be returned to the college upon approval of the Commissioner.

Rule 6A-713(3), Florida Administrative Code, prohibits approval by the Commissioner of any budget amendment for a prior fiscal year received in his office after July 20 of any year.

# BUDGET AMENDMENT REQUEST

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
Affirmative action/equal opportunity employer

______________________________ COLLEGE

RESOLUTION NUMBER ________ FISCAL YEAR ________

AMENDMENT NUMBER ________

Be it Resolved that the Board of Trustees of ______________________________ College District, State of Florida, in meeting assembled, Pursuant to Section 240.335, Florida Statutes, and Rule 6A-14.713, Florida Administrative Code, hereby requests the State Commissioner of Education to approve amendments to the community college budget for the fiscal year as follows:

FUND NAME ______________________________ NUMBER ______________________________

| CATEGORY | Present Budget | Increase | Decrease | Revised Budget |
|---|---|---|---|---|
| Beginning Fund Balance | | | | |
| Revenues (Detail Attached) | | | | |
| Total to be Accounted for | | | | |
| Salaries (Detail Attached) | | | | |
| Current Expenses (Detail Attached) | | | | |
| Capital Outlay (Detail Attached) | | | | |
| Ending Fund Balance | | | | |
| Total Accounted For | | | | |

Justification:

Certified ______________________________ ________ Adopted ______________________________
President Date

STATE OF FLORIDA, DEPARTMENT OF EDUCATION

Approved ______________________________
State Commissioner

By ______________________________ Date ______________________________

## SECTION 4

## INSTRUCTIONS FOR THE PREPARATION OF THE ANNUAL FINANCIAL REPORT FOR FLORIDA'S PUBLIC COMMUNITY COLLEGES

## (AFR)

### General

The Annual Financial Report consists of the following exhibits and schedules:

Exhibit A - Balance Sheet
Exhibit B - Statement of Changes in Fund Balance
Exhibit C - Statement of Current Funds, Revenues, Expenditures and Other Changes
Schedule 1 - Educational and General Expenditures by Organizational Unit
Schedule 2 - Auxiliary Fund Balance Sheet
Schedule 3 - Statement of Revenues, Expenditures and Other Changes Auxiliary Enterprises
Schedule 4 - Statement of Revenues, Expenditures and Other Changes Service Departments
Schedule 5 - Summary of Loan Fund and Endowment Operations
Schedule 6 - Summary of Plant Fund Operations
Schedule 7 - Summary of Investment In Plant
Schedule 8 - Summary of Revenue and Expenditures by General Ledger Code
Appendix A - Notes to Financial Statements
Appendix B - Summary of Significant Accounting Policies

### Form

The report should be prepared on 8½" x 14" pages with at least 3/4 inch margin on the left side to permit stapling or binding. All columnar headings for each exhibit and schedule should be presented on the same page. Each exhibit or schedule should be started on a new page and if continued, subsequent pages should be numbered.

Example: Schedule 3 (p.2 of 6)

Reports may be submitted on size 8½" X 11" by photographic reduction of 8½" X 14" forms.

Sample formats of exhibits and schedules are enclosed. These forms are identical to those contained in the Accounting Manual for Florida's Public Community Colleges, 1974.

### Submission

The Annual Financial Report is to be submitted to the Director, Division of Community Colleges, no later than August 15 of each year. Only one copy of the report is required.

### Specific Instructions

The cover page should show the name of the college, a listing of the enclosures and the statement - "This report is certified to be true" - signed with the original or facsimile signature of the President. No provision for endorsement by the Department of Education is necessary.

The formats for the exhibits and schedules have not been changed and the information to complete them should be readily available from the accounting records, if the records were maintained in accordance with the Accounting Manual. The following guidelines are provided to assist you in preparing the various schedules and exhibits.

## Schedules 1 through 8

The preparation of the Annual Financial Report should begin with Schedules 1 through 8 since most of the information required to complete Exhibits A, B, and C, will be derived from these schedules. The source of the information and the procedures to be used in completing the information to be entered on the schedules will depend on the specific accounting records and procedures in use at your college; therefore, we cannot provide detailed instructions for preparation of them. The following items should be observed in preparing the schedules:

1. All personnel benefits, including all items in the 590 series of General Ledger Codes, should be reported in the departments in which the salaries of the personnel to which they apply are reported. These benefits may be distributed to the departments on an actual basis or prorated.

2. The information contained on Schedule 4 regarding Service Departments housed in the Auxiliary Fund, will not be included in the items relating to the Auxiliary Fund on Exhibits B and C. Since the services provided by these departments are charged to the using departments, including the information from Schedule 4 in Exhibits B and C would result in double reporting. If the procedures prescribed in the Accounting Manual (pages 20-1 and 20-2) are followed, the Revenues and the Expenditures and Other Deductions shown on Schedule 4 will be equal, and thus the operations of the Service Departments will not affect the Fund Balance of the Auxiliary Fund.

3. We note that in some instances, colleges reported Academic and Student Services Vice-Presidents and Deans under the Institutional Support Function in last year's Annual Financial Report. This is not in accord with the current Accounting Manual. The revised Manual (1974 Edition) which was presented to the Council of Business Affairs included these positions in this function; however, it was determined that this procedure was in conflict with the CCMIS Manual and the Accounting Manual was changed. Only those college personnel who have college-wide responsibilities which cannot specifically be associated with another Function should be included in the Institutional Support Function. The Academic Deans and Vice Presidents should be in the Academic Support Function and Deans or Vice Presidents for Student Services should be included in the Student Services Function. (See pages 6-2 and 6-3 of the Accounting Manual.)

## Exhibit A

This exhibit should be prepared after Schedules 1 through 8 have been completed. As you prepare these schedules, you may discover that other adjusting entries should be made.

1. After all adjustments have been made, balance sheet accounts shown on the June 30 Trial Balance for each Fund (except the Loan and Endowment Funds) should be entered in the proper Current Year Fund columns on the Balance Sheet.

2. Any endowment balance sheet accounts in Fund 4 should be entered in the current year Endowment Fund column. (It will be necessary to obtain this information from an analysis of the endowment accounts.)

3. The remaining balance sheet account balances in Fund 4 should be recorded in the Current Year Loan Fund column.

4. The Funds within a Fund Group should be added together to arrive at the Fund Group total for the current year EXCEPT when there are Due To and Due From amounts between Funds within the same Fund Groups such as, $5,000 Due From Fund I in the Auxiliary Fund and $5,000 Due To Fund III in the General Current Fund. In these cases, the Due To and Due From should be eliminated in the Total column and a footnote should be entered indicating that inter-fund advances and liabilities have been eliminated.

5. From the prior year annual Balance Sheet, balance sheet accounts should be entered in the proper Fund or Fund Group columns except for Agency Fund.

## Exhibit B

This exhibit should be prepared after schedules 1 through 8 have been completed. It will be necessary to utilize some of the information in these schedules in preparing Exhibit B.

Exhibit B is the Statement of Changes in Fund Balance and will account for everything which happened during the year having an effect on the fund balance of each fund. Since Agency Funds do not belong to the college, they are excluded from this exhibit.

1. From Schedule 8 (and perhaps even from your detailed accounting records) complete the transfer portion of Exhibit B.

2. For the Restricted Current Fund and for the Scholarship Fund, categorize revenues from Schedule 8 according to major source as indicated on Exhibit B. These revenues plus or minus the transfers should equal the total revenues shown for these two funds in Schedule 8.

3. Deduct transfers from General Current Fund revenues and enter the balance as Educational and General Revenues in the Unrestricted column of Exhibit B. Also deduct transfers from Auxiliary Enterprises revenue (do not include Service Departments) and enter this as Auxiliary Enterprises revenue in the Unrestricted column of Exhibit B. (Auxiliary Enterprises revenue information can be obtained from Schedule 3.)

4. Categorize the revenues in Schedule 8 by source for the Loan and Endowment Funds and Unexpended Plant Funds.

5. From Schedule 7 enter the plant asset additions in the Invested In Plant column of Exhibit B. If you have debt service, the retirement of indebtedness from Schedule 6, section D, will be entered in the Invested In Plant column of the revenue section of Exhibit B.

6. The Restricted Current Fund expenditures will be obtained from Schedule 8 and will be entered as Educational and General Expenditures. Indirect Cost Recovery, General Ledger Code 439 and 449, will also be entered in the Restricted Current column of expenditures.

7. General Ledger Code 439 and 449 will be entered under Indirect Cost Recovered in the Scholarship column of expenditures. The expenditure portion of Schedule 8 for scholarships will be analyzed to get collection costs and other expenses and the remaining expenditures in the Scholarship Fund would be entered as Educational and General Expenditures.

8. Total expenditures for Personnel Costs, Current Expense, and Capital Outlay for the General Current Fund, will be entered in the Unrestricted column as Educational and General Expenditures. Likewise, the expenditures for Auxiliary Enterprises will be obtained from Schedule 3.

9. Schedule 5 should give an adequate analysis of expenditures for loans and endowments.

10. Schedule 6 will give the necessary information to complete the Unexpended Plant expenditure section and the Debt Service expenditure section of Exhibit B.

11. If adjustments were made directly to fund balances of any of the funds during the year, these entries should be analyzed and entered on the appropriate line of Exhibit B. If an adequate description does not already exist on the Exhibit B examples, write in your own description of the transaction.

12. After you add and subtract the various figures in each column, you should come out with the Fund Balance End of Year as shown on Exhibit A Balance Sheet.

Exhibit C

This exhibit should be completed after Exhibit B. It deals only with Current Funds (Fund I and III as unrestricted and Funds II and V as restricted). Since Restricted Fund revenues can be recognized only to the extent they were expended, the restricted figures will probably be different from those in Exhibit B. The proof of accuracy of this report is found on the last line -- Net Increase in Fund Balances which should be the same as that same line on Exhibit B.

1. General Current Fund revenues in Schedule 8 would again be used to enter the transfers on the appropriate lines and would also be used to categorize revenues by type. Please note that Indirect Costs Recovered are

to be shown as Support from the Federal Government or if the Indirect Costs Recovered were from gifts and private grants and contracts, it would be included in that section.

2. Auxiliary Enterprises revenue should be the same as Auxiliary Enterprises revenue shown on Exhibit B.

3. Schedule 1 shows expenditures of the General Current and Restricted Current Fund by function. Therefore, the Educational and General expenditures portion of Exhibit C will be obtained from this schedule. Please note that Scholarship Fund information is also shown on Schedule 1.

4. Auxiliary Enterprises expenditures should be the same as on Exhibit B.

5. The Restricted Current Fund revenue section is the most difficult part of Exhibit C. Revenues for Fund II can be shown only to the extent they were expended. Therefore, we would strongly recommend that each college debit revenues and credit deferred income for any unspent receipts in Fund II each year. If this practice is followed, Fund II revenues will be the same on Exhibit C as on Exhibit B, except that Indirect Costs Recovered will not be shown on Exhibit C--only grants received and actually spent will be reported there. The Indirect Costs Recovered will be included in Fund I revenue as already explained. If unspent receipts are not backed out of revenues, the difference between the receipts and the expenditures will be entered in the last section of Exhibit C and "Excess of Restricted Receipts over Transfers to Revenue."

6. When the columns are totaled, the net increase in fund balances should equal the net increase for the year as shown on Exhibit B.

## Appendix A

The Accounting Manual contains no reference to this appendix. In accordance with the accepted procedures described in the AICPA Audit Guide, this appendix will be used to summarize the notes of the financial statements. All notes should be included here rather than on the various exhibits and schedules. A list of examples of notes is attached to these instructions. Other examples may be found in the Audit Guide. The notes should be used to explain any items contained in the financial statements which require amplification to be fully understandable to the user. All colleges should include a note providing an estimate of the amount of uncollectible loans.

## Appendix B

This appendix also is not contained in the Accounting Manual, but is included in these instructions to conform to procedures contained in the Audit Guide. This appendix is intended to describe the significant accounting policies followed by the college thereby enhancing the usefulness of the financial statements to the reader. An example of a typical statement for a community college is attached. Your statement should contain basically the same information.

Exhibit A
Part 1

______________ COLLEGE
BALANCE SHEET
JUNE 30, 19__

WITH COMPARATIVE FIGURES AT JUNE 30, 19__

| | Unrestricted Fund Group | | | | Restricted Fund Group | | | |
|---|---|---|---|---|---|---|---|---|
| | General Fund | Auxiliary Fund | Total Current Year | Prior Year | Restricted Fund | Scholarship Fund | Current Year | Prior Year |
| **Assets** | | | | | | | | |
| Cash | $ | $ | $ | $ | $ | $ | $ | $ |
| Accounts Receivable | | | | | | | | |
| Investments | | | | | | | | |
| Inventories | | | | | | | | |
| Due From Other Funds | | | | | | | | |
| Prepaid Expenses & Other Assets | | | | | | | | |
| Total Assets | $ | $ | $ | $ | $ | $ | $ | $ |
| **Liabilities and Fund Balances** | | | | | | | | |
| **Liabilities** | | | | | | | | |
| Accounts Payable | $ | $ | $ | $ | $ | $ | $ | $ |
| Salaries and Wages Payable | | | | | | | | |
| Payroll Taxes and Deductions Payable | | | | | | | | |
| Deferred Income | | | | | | | | |
| Due to Other Funds | | | | | | | | |
| Total Liabilities | $ | $ | $ | $ | $ | $ | $ | $ |
| **Fund Balances** | | | | | | | | |
| Funds Restricted For Encumbrances | $ | $ | $ | $ | $ | $ | $ | $ |
| Funds Allocated for Staff and Program Development | | | | | | | | |
| Unallocated Fund Balances | | | | | | | | |
| Total Fund Balances | $ | $ | $ | $ | $ | $ | $ | $ |
| Total Liabilities and Fund Balances | $ | $ | $ | $ | $ | $ | $ | $ |

Exhibit A
Part 2

## ______________ COLLEGE
## BALANCE SHEET
## NON-CURRENT FUNDS

| | Endowment Funds | | Loan Funds | | Plant Fund Group | | | | | Agency Fund |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | Current Year | | | | | |
| | Current Year | Prior Year | Current Year | Prior Year | Unexpended Plant | Debt Service | Invested In Plant | Total | Prior Year | Current Year |
| **Assets** | | | | | | | | | | |
| Cash | $ | $ | $ | $ | $ | $ | $ | $ | $ | $ |
| Notes Receivable | | | | | | | | | | |
| Investments | | | | | | | | | | |
| Due From Other Funds | | | | | | | | | | |
| Land | | | | | | | | | | |
| Buildings | | | | | | | | | | |
| Other Structures & Improvements | | | | | | | | | | |
| Furniture, Machinery & Equipment | | | | | | | | | | |
| Books | | | | | | | | | | |
| Films | | | | | | | | | | |
| Construction in Progress | | | | | | | | | | |
| Total Assets | $ | $ | $ | $ | $ | $ | $ | $ | $ | $ |
| **Liabilities and Fund Balances** | | | | | | | | | | |
| **Liabilities** | | | | | | | | | | |
| Accounts Payable | $ | $ | $ | $ | $ | $ | $ | $ | $ | $ |
| Payroll Taxes & Deductions Payable | | | | | | | | | | |
| Due to Other Funds | | | | | | | | | | |
| Bonds Payable | | | | | | | | | | |
| Total Liabilities | $ | $ | $ | $ | $ | $ | $ | $ | $ | $ |
| **Fund Balances** | | | | | | | | | | |
| Funds Restricted for Encumbrances | $ | $ | $ | $ | $ | $ | $ | $ | $ | $ |
| Fund Balances, Restricted | | | | | | | | | | |
| Fund Balances, Unrestricted | | | | | | | | | | |
| Net Investment in Plant | | | | | | | | | | |
| Total Fund Balances | $ | $ | $ | $ | $ | $ | $ | $ | $ | $ |
| Total Liabilities & Fund Balances | $ | $ | $ | $ | $ | $ | $ | $ | $ | $ |

Exhibit B

## ____________ COLLEGE
## STATEMENT OF CHANGES IN FUND BALANCE
## FOR THE YEAR ENDED JUNE 30, 19__

| | Current Fund Group | | | | | Plant Fund Group | | |
|---|---|---|---|---|---|---|---|---|
| | | Restricted Fund Group | | | | | | |
| | Unrestricted (General & Auxiliary | Restricted Current | Scholarship | Total Restricted | Loan and Endowment Fund | Unexpended Plant | Debt Service | Invested in Plant |
| **Revenues & Other Additions** | | | | | | | | |
| Educational & General Revenues | $ | $ | $ | $ | $ | $ | $ | $ |
| Auxiliary Enterprises Revenues | | | | | | | | |
| Governmental Grants & Contracts-Restricted | | | | | | | | |
| Governmental Appropriations-Restricted | | | | | | | | |
| Investment Income-Restricted | | | | | | | | |
| Realized Gains on Investments-Restricted | | | | | | | | |
| Other Receipts | | | | | | | | |
| Plant Asset Additions | | | | | | | | |
| Retirement of Indebtedness | | | | | | | | |
| Total Revenues & Other Additions | $ | $ | $ | $ | $ | $ | $ | $ |
| **Expenditures & Other Deductions** | | | | | | | | |
| Educational & Gen. Expenditures | $ | $ | $ | $ | $ | $ | $ | $ |
| Auxiliary Enterprises Expenditures | | | | | | | | |
| Indirect Costs Recovered | | | | | | | | |
| Refunded to Grantors | | | | | | | | |
| Loan Cancellations and Write-Offs | | | | | | | | |
| Collection Costs & Other Expenses | | | | | | | | |
| Expended For Plant Asset Additions | | | | | | | | |
| Debt Retirement & Interest | | | | | | | | |
| Disposal of Plant Assets | | | | | | | | |
| Total Expenditures & Other Deductions | $ | $ | $ | $ | $ | $ | $ | $ |
| **Transfers, Additions, (Deductions)** | | | | | | | | |
| Mandatory-Matching Grants | $ | $ | $ | $ | $ | $ | $ | $ |
| Non-Mandatory | | | | | | | | |
| Total Transfers | $ | $ | $ | $ | $ | $ | $ | $ |
| Net Increase (Decrease) For Year | | | | | | | | |
| Fund Balance, Beginning of Year | | | | | | | | |
| Fund Balance, End of Year | $ | $ | $ | $ | $ | $ | $ | $ |

Exhibit C

## ______________ COLLEGE
## STATEMENT OF CURRENT FUND REVENUES, EXPENDITURES AND OTHER CHANGES
## FOR THE YEAR ENDED JUNE 30, 19__
## WITH COMPARATIVE FIGURES FOR 19__

| | Current Year | | | |
|---|---|---|---|---|
| | Unrestricted (Fund I & III) | Restricted (Fund II & V) | Total | Prior Year |
| **Revenues & Mandatory Transfers - In** | | | | |
| Educational and General | $ | $ | $ | $ |
| Student Fees | | | | |
| Support from Local Government | | | | |
| Support from State Government | | | | |
| Support from Federal Government | | | | |
| Gifts & Private Grants & Contracts | | | | |
| Sales and Services | | | | |
| Endowment Income | | | | |
| Other Sources | | | | |
| Total Educational & General | $ | $ | $ | $ |
| Auxiliary Enterprises | | | | |
| Total Revenues | $ | $ | $ | $ |
| **Expenditures & Mandatory Transfers** | | | | |
| Educational & General | | | | |
| Instruction | $ | $ | $ | $ |
| Research | | | | |
| Public Services | | | | |
| Academic Support-Learning Resources | | | | |
| Academic Support-Other | | | | |
| Student Services | | | | |
| Institutional Support | | | | |
| Physical Plant Operation & Maintenance | | | | |
| Student Aid | | | | |
| Total Educational & General Expenditures | $ | $ | $ | $ |
| Mandatory Transfers For: | | | | |
| Matching Grants | $ | $ | $ | $ |
| Total Educational and General | $ | $ | $ | $ |
| Auxiliary Enterprises | | | | |
| Expenditures | $ | $ | $ | $ |
| Mandatory Transfers | | | | |
| Total Auxiliary Enterprises | $ | $ | $ | $ |
| Total Expenditures & Mandatory Transfers | $ | $ | $ | $ |
| Other Transfers & Additions (Deductions) | | | | |
| Refunded to Grantors | $ | $ | $ | $ |
| Non-Mandatory Transfers For: | | | | |
| List | | | | |
| Excess of Restricted Receipts over Transfers to Revenue | | | | |
| Net Increase in Fund Balance | $ | $ | $ | $ |

Schedule 1

## ____________ COLLEGE
## EDUCATIONAL & GENERAL EXPENDITURES, BY ORGANIZATIONAL UNIT
## FOR THE YEAR ENDED JUNE 30, 19__

| | Personnel Costs | | Current Expenses | | Capital Outlay | | |
|---|---|---|---|---|---|---|---|
| | Unrestricted | Restricted | Unrestricted | Restricted | Unrestricted | Restricted | Total |
| Instruction | $ | $ | $ | $ | $ | $ | $ |
| List the organizational units within this function and total each column. Do the same for each of the following functions: | | | | | | | |
| Research | | | | | | | |
| Public Service | | | | | | | |
| Academic Support-Learning Resources | | | | | | | |
| Academic Support-Other | | | | | | | |
| Student Services | | | | | | | |
| Institutional Support | | | | | | | |
| Physical Plant Operation & Maintenance | | | | | | | |
| Student Aid, Fund I and II | | | | | | | |
| Total Funds I and II | $ | $ | $ | $ | $ | $ | $ |
| Student Aid, Scholarship Fund | | | | | | | |
| Colleges may list each scholarship account, or they may group them by source of Funds such as:<br>Federal Scholarships<br>State Scholarships<br>etc. | | | | | | | |
| Total Scholarship Fund | $ | $ | $ | $ | $ | $ | $ |
| Total Educational & General Expenditures | $ | $ | $ | $ | $ | $ | $ |

4.10

Schedule 2

### ____________________ COLLEGE
### AUXILIARY FUND BALANCE SHEET
### JUNE 30, 19__

4.11

| | Bookstores | Vending Machines | Food Service | Housing | Central Stores | Duplicating Shop | Office Machine Repair | Fund Total |
|---|---|---|---|---|---|---|---|---|
| **Assets** | | | | | | | | |
| Cash | $ | $ | $ | $ | $ | $ | $ | $ |
| Accounts Receivable | | | | | | | | |
| Investments | | | | | | | | |
| Inventories | | | | | | | | |
| Due From Other Funds | | | | | | | | |
| Prepaid Expenses and Other Assets | | | | | | | | |
| Total Assets | $ | $ | $ | $ | $ | $ | $ | $ |
| **Liabilities and Fund Balances** | | | | | | | | |
| **Liabilities** | $ | $ | $ | $ | $ | $ | $ | $ |
| Accounts Payable | | | | | | | | |
| Salaries and Wages Payable | | | | | | | | |
| Payroll Taxes & Deductions Payable | | | | | | | | |
| Due To Other Funds | | | | | | | | |
| Total Liabilities | $ | $ | $ | $ | $ | $ | $ | $ |
| **Fund Balances** | | | | | | | | |
| Funds Restricted for Encumbrances | $ | $ | $ | $ | $ | $ | $ | $ |
| Unallocated Fund Balances | | | | | | | | |
| Total Fund Balances | $ | $ | $ | $ | $ | $ | $ | $ |
| Total Liabilities and Fund Balances | $ | $ | $ | $ | $ | $ | $ | $ |

Schedule 3

## ______________________ COLLEGE
## STATEMENT OF REVENUES, EXPENDITURES AND OTHER CHANGES
## AUXILIARY ENTERPRISES
## YEAR ENDED JUNE 30, 19__
## WITH COMPARATIVE FIGURES FOR 19__

| | Bookstore | Vending Machines | Food Service | Housing | Total Current Year | Prior Year |
|---|---|---|---|---|---|---|
| **Revenues** | | | | | | |
| Sales | $ | $ | $ | $ | $ | $ |
| Interdepartmental Sales | | | | | | |
| Commissions | | | | | | |
| Other | | | | | | |
| Total Revenues | $ | $ | $ | $ | $ | $ |
| **Expenditures and Other Deductions** | | | | | | |
| **Operating Expenditures** | | | | | | |
| Personnel Costs (510-598) | $ | $ | $ | $ | $ | $ |
| Services (605-645) | | | | | | |
| Materials & Supplies (655-665) | | | | | | |
| Cost of Goods Sold (675) | | | | | | |
| Total Operating Expenditures | $ | $ | $ | $ | $ | $ |
| **Other Deductions** | | | | | | |
| Capital Outlay (705-790) | $ | $ | $ | $ | $ | $ |
| Mandatory Transfers (491) | | | | | | |
| Non-Mandatory Transfers (492) | | | | | | |
| Total Other Deductions | $ | $ | $ | $ | $ | $ |
| Net Increase (Decrease) in Fund Balance | $ | $ | $ | $ | $ | $ |

Schedule 4

## ______________ COLLEGE
## STATEMENT OF REVENUES, EXPENDITURES AND OTHER CHANGES
## SERVICE DEPARTMENTS
## YEAR ENDED JUNE 30, 19__
## WITH COMPARATIVE FIGURES FOR 19__

| | Central Stores | Duplicating Shop | Office Machine Repair | Total Current Year | Prior Year |
|---|---|---|---|---|---|
| **Revenues** | | | | | |
| Interdepartmental Sales (469) | $ | $ | $ | $ | $ |
| Subsidy from Educational and General (492) | | | | | |
| Total Revenues | $ | $ | $ | $ | $ |
| **Expenditures and Other Deductions** | | | | | |
| Personnel Costs (510-598) | $ | $ | $ | $ | $ |
| Services (605-645) | | | | | |
| Materials and Supplies (655-665) | | | | | |
| Cost of Goods Sold (675) | | | | | |
| Capital Outlay (705-790) | | | | | |
| Total Expenditures and Other Deductions | $ | $ | $ | $ | $ |

Schedule 5

____________________ COLLEGE
SUMMARY OF LOAN FUND & ENDOWMENT OPERATIONS
FOR THE YEAR ENDED JUNE 30, 19__

| | Fund Balance July 1, 19 | New Funds Received | Transfers | Interest Earned | Capital Returned To Donor | Loans Written Off | Collection and Other Expenses | Fund Balance June 30, 19 | Memo New Loans to Students |
|---|---|---|---|---|---|---|---|---|---|
| Loan Funds | | | | | | | | | |
| May list each separate loan account, or may group them according to categories such as: Loan Funds from Local Government, Loan Funds from State Government, etc. | $ | $ | $ | $ | $ | $ | $ | $ | $ |
| Total Loan Funds | $ | $ | $ | $ | $ | $ | $ | $ | $ |
| Endowment Funds | | | | | | | | | |
| List each endowment account separately | $ | $ | $ | $ | $ | $ | $ | $ | $ |
| Total Endowment Funds | $ | $ | $ | $ | $ | $ | $ | $ | $ |
| Total Loan & Endowment Funds | $ | $ | $ | $ | $ | $ | $ | $ | $ |

Schedule 6

______________________COLLEGE
SUMMARY OF PLANT FUND OPERATIONS
FOR THE YEAR ENDED JUNE 30, 19__

| | Total Funds | Local Funds | License Tag Fees | SBE Bonds | Higher Ed. Bonds |
|---|---|---|---|---|---|
| A. **Summary By Fund Source** | | | | | |
| Beginning Balances, July 1, 19__ | $ | $ | $ | $ | $ |
| Add: Revenue | | | | | |
| Transfers | | | | | |
| Bond Proceeds | | | | | |
| Deduct Expenditures | | | | | |
| Fund Balances, June 30, 19__ | $ | $ | $ | $ | $ |
| B. **Expenditures, By Project and Source** (List each Project) | $ | $ | $ | $ | $ |
| Total Expenditures | $ | $ | $ | $ | $ |

| | Fund Balance 7-1-__ | Receipts | Project Reallocations | | Expenditures | | | Fund Balances, 6-30-__ | |
|---|---|---|---|---|---|---|---|---|---|
| | | | | Equipment | Buildings | Land | Improvements | Encumbered | Unencumbered |
| C. **Summary by Project** (List each project) | $ | $ | $ | $ | $ | $ | $ | $ | $ |
| Totals | $ | $ | $ | $ | $ | $ | $ | $ | $ |

| | Fund Balance 7-1-__ | Receipts | Payments for | | Fund Balance 6-30-__ | Memo Bonds Outstanding 6-30-__ |
|---|---|---|---|---|---|---|
| | | | Interest | Principal | | |
| D. **Debt Service** (List each bond issue) | $ | $ | $ | $ | $ | $ |
| Total | $ | $ | $ | $ | $ | $ |

Schedule 7

## ______________ COLLEGE
## SUMMARY OF INVESTMENT IN PLANT
## FOR THE YEAR ENDED JUNE 30, 19__

| | Balances July 1, 19__ | Additions | Deductions | Balances June 30, 19__ |
|---|---|---|---|---|
| Land | $ | $ | $ | $ |
| Buildings (List each building) | | | | |
| Other Structures and Improvements | | | | |
| Furniture, Machinery and Equipment | | | | |
| Books | | | | |
| Films | | | | |
| Construction in Progress | | | | |
| Total Investment In Plant Fund | $ | $ | $ | $ |
| Less Bonds Payable (Fund 9 only) | | | | |
| Net Investment in Plant Fund | $ | $ | $ | $ |

Schedule 8

## ____________________ COLLEGE
## SUMMARY OF REVENUE AND EXPENDITURES, BY GENERAL LEDGER CODE
## FOR THE FISCAL YEAR

| | General Current | Restricted Current | Auxiliary Current | Loan and Endowment | Scholarship | Unexpended Plant | Debt Service | Total All Funds |
|---|---|---|---|---|---|---|---|---|
| Revenue | | | | | | | | |
| 401 In-State Matriculation | $ | $ | $ | $ | $ | $ | $ | $ |
| 403 Out-of-State Tuition & Matriculation | | | | | | | | |
| etc. | | | | | | | | |
| Total Revenue | $ | $ | $ | $ | $ | $ | $ | $ |
| Personnel Costs | | | | | | | | |
| (List detail codes) | $ | $ | $ | $ | $ | $ | $ | $ |
| Total Personnel Costs | $ | $ | $ | $ | $ | $ | $ | $ |
| Current Expenses | | | | | | | | |
| (List detail codes) | $ | $ | $ | $ | $ | $ | $ | $ |
| Total Current Expenses | $ | $ | $ | $ | $ | $ | $ | $ |
| Capital Outlay | | | | | | | | |
| (List detail codes) | $ | $ | $ | $ | $ | $ | $ | $ |
| Total Capital Outlay | $ | $ | $ | $ | $ | $ | $ | $ |
| Total Expenditures | $ | $ | $ | $ | $ | $ | $ | $ |

(SAMPLE)

______________________________COLLEGE

## NOTES TO FINANCIAL STATEMENTS

June 30, 19____

1. Investments consist of certificates of deposits and are recorded at cost.

2. Inventories of the Auxiliary Fund are recorded at last invoice cost.

3. Physical Plant and equipment are recorded at cost at date of acquisition or at appraised value at date received in the case of gifts or purchases from the State's Division of Surplus Property. Some items of equipment purchased from the Division of Surplus Property have title restrictions. Depreciation on physical plant and equipment is not recorded.

4. Bonds payable represent the College's portion of the State's Capital Outlay Bonds, Series 1978-A, sold through the Department of Education on behalf of specific community colleges and district school boards. The College's portion was sold, pursuant to a resolution of the Board of Trustees, to finance construction of a learning resources center. The principal amount sold in January, 1978, was $265,000. An amount of $241,080 has been recorded as a liability of the Unexpended Plant Fund (during construction period) and an amount of $23,920 has been recorded as a liability of the Debt Service Fund (representing proceeds desposited to cover initial reserve requirements). The maturity dates range from July 1, 1978, through Jaunuary 1, 1999, and the interest rates vary from 4% to 5.5%. Interest payable to maturity on these obligations amounts to $179,010.

   A portion of the future allocations of the College's Capital Outlay and Debt Service Funds (provided by the State from legally obligated monies for such purpose) are pledged as revenue to secure the issue. The actual debt service payments are made by the State Board of Administration from monies provided by the Department of Education on behalf of the College.

5. Employees of the College participated in retirement plans of the State administered by the Department of Administration, Division of Retirement. Information regarding the acturial soundness, financial condition, etc., of the State's retirement plans is not made available to the College and accordingly is not disclosed herein.

6. Attendance and leave policies and regulations make provisions for granting employees a specified number of days leave each year. Leave will be taken or will become payable at termination as provided by Section 240.343, Florida Statutes and Rule 6A-14.431, Florida Administrative Code. Leave earned but not taken at June 30, 19____ represents a commitment for future expenditures; however, this commitment is not presented in the balance sheet because it is not practical to estimate the cost of such accrued leave.

7. The amount of uncollectable notes receivable from student loans is estimated to be $1,491.

8. Contracts in the amount of $1,533,633 have been awarded for the construction of the learning resources center mentioned in note 4 above.

(SAMPLE)

## ______________________ COLLEGE

## SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

June 30, 19__

The significant accounting policies followed by ______________________ College are described below to enhance the usefulness of the financial statements to the reader.

### Reporting Entity

Although the College is considered a separate entity for financial reporting purposes, it is a part of the State's Community College System. The College is managed by an appointed board of trustees, but is under the general direction and control of the Department of Education, Division of Community Colleges and also governed by Florida Statues and Rules of the State Board of Education.

The College maintains its accounts under various Fund captions as prescribed by the Department of Education, Division of Community Colleges. The Funds are structured around the recommendations of the National Association of College and University Business Officers.

### Basis of Accounting

The accounts were maintained and financial statements were prepared on the accrual basis of accounting except for depreciation accounting as explained in note three to the financial statements. Notes receivable from students are reported at face value. An estimate of the amount of uncollectible loans is shown in note seven to the financial statements. Revenues of an academic term that encompasses parts of two fiscal years, such as a summer session, are reported in the fiscal year in which they are earned and expenditures are reported in the fiscal year in which the goods or services are received. Student fees are considered earned when the College's refund period has expired.

The Statement of Changes in Fund Balance is a statement of financial activities of all funds related to the current reporting period. It does not purport to represent the results of operations or the net income or loss for the period as would a statement of income or a statement of revenues and expenses.

To the extent that current funds are used to finance plant assets, the amounts so provided are accounted for as expenditures in the case of acquisition and normal replacement of movable equipment and library books, and as transfers of a non-mandatory nature for construction of physical plant.

### Fund Accounting

In order to insure observance of limitations and restrictions placed on the use of resources available to the college, the financial records and accounts of the college are maintained in accordance with the principles of "fund accounting".

This is the procedure by which resources for various purposes are classified for accounting and reporting purposes into funds that are in accordance with activities or objectives specified. Separate accounts are maintained for each fund; however, in the accompanying financial statements, funds that have similar characteristics have been combined into fund groups. Accordingly, all financial transactions have been recorded and reported by fund group. The funds used are defined as follows:

1. General Current Fund
   This fund is used to account for resources that are available for the general financial requirements of the college, the only restrictions being those imposed by law and the budget. Generally, they are the resources received to finance the educational program of the college as a whole. The organizational units financed through this fund are those which are directly concerned with the operation and support of the educational program.

2. Restricted Current Fund
   This fund is used to account for resources that are available for the operation and support of the educational program but are restricted by the donors or other outside agency as to the specific purpose for which they may be expended. The organizational units financed through this fund are usually the same as those financed through the General Current Fund.

3. Auxiliary Fund
   This fund is used to account for both auxiliary activities and service departments. Auxiliary activities are those established primarily to provide non-instructional services for sale to students, faculty and staff and which are intended to be self-supporting. Service departments are those established to provide services for other departments of the college.

4. Loan and Endowment Fund
   This fund is used to account for two types of resources: loan funds and endowment funds.

   Loan funds are those resources which are available for loans to students regardless of whether or not the college is responsible for collection of the loan. When the college is requested to do fiduciary accounting for loans which are to be repaid to some other agency, they are included here and loans made during the year are written off against fund balance at the end of the year. Loan funds for which the recipient of the loan is not selected by the college are not included in this fund. Such funds are included in the Agency Fund or in the General Current Fund.

   Endowment funds are those resources the principal of which must be maintained inviolate to conform with restrictions placed thereon by the donor or other outside agency. Generally, only the income from these funds may be used. Sometimes, however, terms of the endowment provide that the principal may be expended upon the passage of a stated period of time or the occurrence of a particular event. These are called "term endowment funds" and are reported separately from true endowments.

Endowments are classified as "restricted" if the income may be used only for certain designated purposes and are classified as "unrestricted" if the income may be used, without restriction, for any purpose of the college.

5. Scholarship Fund
This fund is used to account for resources available for awards to students but that are not in payment for services rendered and will not require repayment to the college. Funds received from donors, who reserve the right to designate the recipient of the award, are not accounted for in this fund, but are accounted for in the Agency Fund or the General Current Fund.

6. Agency Fund
This fund is used to account for resources received and held by the college as custodian or fiscal agent for others and for temporary revenue and expenditure accounts which serve as "clearing" accounts for resources which cannot be immediately classified by fund. Agency accounts are classified as:

   Clearing Accounts - Temporary accounts to aid the college in distributing income and expenditures between funds.

   Organizations - Activities of students, faculty or staff or other organizations indirectly related to the college, including organizations which provide loans to students but which are not repaid by the college.

7. Unexpended Plant Fund
This fund is used to account for resources that are available for the acquisition or construction of physical property to be used for college purposes and resources designated for the major repair or replacement of college property. These funds, generally, can be expended only for projects approved by a State Department of Education survey and include the purchase of land, site development, building construction costs, initial furnishings and equipment for new buildings and major repairs.

8. Debt Service Fund
This fund is used to account for the resources which will be used to retire the long-term debts of the college. Resources used for retirement of the debt and payment of interest on the obligation are accounted for in this fund.

9. Invested in Plant Fund
This fund is used to account for the cumulative costs of plant assets of the college. The assets consist of land, buildings, other structures and improvements, construction in progress, furniture, machinery, and equipment, books and films.

# SECTION 5

## QUARTERLY FINANCIAL REPORTS

These reports provide an interim status statement of the financial condition of the college by providing up-to-date accounting information. The following reports are used for this purpose:

1. Quarterly Statement of Trial Balance - This report shows the quarterly status of each general ledger account.
2. Quarterly Statement of Budgeted and Actual Revenues - This report provides current budget estimate and the actual revenue recorded year-to-date for each revenue account. These data are collected for the following funds: General Current, Restricted Current and Unexpended Plant.
3. Quarterly Statement of Budgeted and Actual Expenditures - This report provides current budget estimate and the actual expenditures year-to-date for each expenditure account. These data are collected for the same three funds as the revenues.
4. Quarterly Report of Expenditures Budgeted by Function - This is a report submitted quarterly which shows the current budget status for expenditures by function in summary form (General and Restricted Current Funds only).

The above reports are not required for the fourth quarter of any fiscal year since the required data is contained in the Annual Financial Report.

______________ COLLEGE
TRIAL BALANCE

SAMPLE FORMAT

______________
Date

NAME OF FUND ______________________________

5.2

| G. L. Code | Account Name | Balance 7-1- | YEAR-TO-DATE Debits | YEAR-TO-DATE Credits | Balance (Current Date) |
|---|---|---|---|---|---|
| 101 | Cash in Bank | $ 60,000.00 | $ 705,000.00 | $ 458,800.00 | $ 306,200.00 |
| 122 | Petty Cash | 1,000.00 | | | 1,000.00 |
| 130 | Accounts Receivable | 10,000.00 | | 10,000.00 | |
| 162 | Investments | 20,000.00 | 5,000.00 | | 25,000.00 |
| 180 | Due from Other Funds | 25,000.00 | | | 25,000.00 |
| 225 | Accounts Payable | 4,000.00 CR | 4,000.00 | | |
| 280 | Due to Other Funds | | | 4,000.00 | 4,000.00 CR |
| 301 | Funds Restricted for Encumbrances | 12,000.00 CR | 456,000.00 | 765,000.00 | 321,000.00 CR |
| 311 | Fund Balance-College | 100,000.00 CR | | 12,000.00 | 112,000.00 CR |
| 340 | Budgeted Revenues | 1,000,000.00 | | | 1,000,000.00 |
| 350 | Budgeted Salaries | 700,000.00 CR | | | 700,000.00 CR |
| 351 | Encumbrances - Salaries | | 650,000.00 | 340,000.00 | 310,000.00 |
| 360 | Budgeted Current Expenses | 250,000.00 CR | | | 250,000.00 CR |
| 361 | Encumbrances - Current Expenses | | 100,000.00 | 95,000.00 | 5,000.00 |
| 370 | Budgeted Capital Outlay | 60,000.00 | | | 60,000.00 CR |
| 371 | Encumbrances - Capital Outlay | | 27,000.00 | 21,000.00 | 6,000.00 |
| 380 | Budgeted Fund Balance Changes | 10,000.00 | | | 10,000.00 |
| 400 | Revenues | | 5,000.00 | 700,000.00 | 695,000.00 CR |
| 500 | Salary Expenditures | | 340,000.00 | | 340,000.00 |
| 600 | Current Expense Expenditures | | 93,500.00 | 500.00 | 93,000.00 |
| 700 | Capital Outlay Expenditures | | 20,800.00 | | 20,800.00 |
| | | $ | $2,406,300.00 | $2,406,300.00 | $ |

______________________ COLLEGE

SAMPLE FORMAT

STATEMENT OF BUDGETED AND ACTUAL REVENUES
From July 1, 19__ Through __________, 19__

| | | GENERAL CURRENT FUND | | RESTRICTED CURRENT FUND | | UNEXPENDED PLANT FUND | | DEBT SERVICE FUND | |
|---|---|---|---|---|---|---|---|---|---|
| | | Revenue Year-to-Date | Current Budget | Revenue Year-to-Date | Current Budget | Revenue Year-to-Date | Current Budget | Revenue Year-to-Date | Current Budget |
| 401 | In-State Matriculation | $ | $ | $ | $ | $ | $ | $ | $ |
| 403 | Out-of-State Matriculation and Tuition | | | | | | | | |
| 404 | Laboratory Fees | | | | | | | | |
| 409 | Other Student Fees | | | | | | | | |
| 421 | College Program Fund | | | | | | | | |
| 422 | License Tag Fee Allocation | | | | | | | | |
| 423 | Gross Utility Tax & Higher Education Bonds | | | | | | | | |
| 435 | From Health, Education and Welfare | | | | | | | | |
| 481 | Interest and Dividends | | | | | | | | |
| 491 | Transfers, Mandatory | | | | | | | | |
| | TOTAL REVENUE | $ | $ | $ | $ | $ | $ | $ | $ |

______________________ COLLEGE

STATEMENT OF BUDGETED AND ACTUAL EXPENDITURES
From July 1, 19__ Through ____________, 19__

SAMPLE FORMAT

| | GENERAL CURRENT FUND | | RESTRICTED CURRENT FUND | | UNEXPENDED PLANT FUND | | DEBT SERVICE FUND | |
|---|---|---|---|---|---|---|---|---|
| | Expended Year-to-Date | Current Budget | Expended Year-to-Date | Current Budget | Expended Year-to-Date | Current Budget | Expended Year-to-Date | Current Budget |
| SALARIES | | | | | | | | |
| 510 Executive, Admin., Managerial | $ | $ | $ | $ | $ | $ | $ | $ |
| 540 Tech., Clerical, Trade & Service | | | | | | | | |
| 585 Student Employment | | | | | | | | |
| etc. | | | | | | | | |
| Total Salaries | $ | $ | $ | $ | $ | $ | $ | $ |
| CURRENT EXPENSE | | | | | | | | |
| 605 Travel | $ | $ | $ | $ | $ | $ | $ | $ |
| 610 Freight and Postage | | | | | | | | |
| 615 Telephone and Telegraph | | | | | | | | |
| 620 Printing | | | | | | | | |
| 625 Repairs & Maintenance | | | | | | | | |
| 630 Rentals | | | | | | | | |
| 635 Insurance | | | | | | | | |
| 640 Utilities | | | | | | | | |
| - Etc. | | | | | | | | |
| Total Current Expense | $ | $ | $ | $ | $ | $ | $ | $ |
| CAPITAL OUTLAY | | | | | | | | |
| 710 Furniture & Equipment | $ | $ | $ | $ | $ | $ | $ | $ |
| 730 Library Books & Films | | | | | | | | |
| 750 Buildings & Fixed Equipment | | | | | | | | |
| 790 Other Structures & Improvements | | | | | | | | |
| Total Capital Outlay | $ | $ | $ | $ | $ | $ | $ | $ |
| TOTAL - ALL EXPENDITURES | $ | $ | $ | $ | $ | $ | $ | $ |

SAMPLE FORMAT

______________________ COLLEGE

SUMMARY OF BUDGETED EXPENDITURES BY FUNCTION

__________ CURRENT FUND

5.5

| FUNCTION | PERSONNEL | CURRENT EXPENSE | CAPITAL OUTLAY | TOTAL |
|---|---|---|---|---|
| INSTRUCTION | | | | |
| RESEARCH | | | | |
| PUBLIC SERVICE | | | | |
| ACADEMIC SUPPORT | | | | |
| STUDENT SERVICES | | | | |
| INSTITUTIONAL SUPPORT | | | | |
| PLANT OPERATION & MAINTENANCE | | | | |
| STUDENT AID | | | | |
| CONTINGENCY, TRANS., ETC. | | | | |
| TOTAL | | | | |

# SECTION 6

# COST ANALYSIS

## Introduction

This section describes the system for the analysis of operating expenditures of Florida community colleges. The system provides uniform procedures, definitions, and report forms to be used by each college to develop, analyze, and report cost information.

## Objectives

The system for analysis of the operating expenditures of Florida community colleges is designed to show the cost of providing instruction for each individual course and for various levels of course aggregations. All courses and their associated costs are included in the analysis regardless of the source of revenues which support them. The system identifies the components of cost according to two basic parameters:

A. The type of expenditures; i.e., personnel expenditures, supplies and service expenditures, and equipment expenditures.

B. The purpose of the expenditures; i.e., instructional salaries, departmental expenditures, and support program expenditures.

The information developed by this system can be used for the following purposes:

A. To aid college administrators in making resource allocation and programming decisions,

B. To conduct comparative cost studies,

C. To develop and support requests for funds from the State Legislature,

D. To allocate funds to individual colleges,

E. To make long-range cost projections.

## General Principles and Definitions

The following general principles should be applied uniformly by colleges when conducting the cost analysis:

A. Expenditures included in the analysis are those recorded in the General Current (Fund 1) and Restricted Current (Fund 2) funds with the exception of fee waivers recorded as expenditures in Accounts 598 and 680 and certain non-program expenditures (see CA-1). It also includes the expenditures from accounts 710-Furniture and Equipment and 730-Library Books and Films recorded in Fund 7, the Unexpended Plant Fund.

B. The analysis includes all courses which began in the ACADEMIC YEAR. The instructional personnel expenditures associated with conducting these courses are included in the analysis for the academic year in which the courses were taught. All other expenditures (other personnel expenditures, current expense, and capital outlay) are taken for the FISCAL YEAR. In other words, all expenditures made to persons for conducting instructional activities (courses) are assigned to the courses they taught. Thus, an adjustment must be made if the expenditure was made in another fiscal year (see Report CA-1).

C. The unit for measurement of production is the semester credit (SC) and semester credit equivalent (non-credit courses). The credit equivalent is computed by dividing the total number of instructional hours in non-credit courses by 27. Semester credit and equivalencies are converted to annualized full-time equivalent units (FTE) by dividing the total number by 30.

D. There are two basic formats for developing and displaying cost data:

1. Direct costs are those associated with conducting activities classified according to the principles and definitions in the Community College Information Classification Structure (ICS).

   Report CA-2 shows the cost centers for which direct costs are to be reported. Direct costs are defined in this analysis as those which can be directly related to conducting an activity or a set of activities defined in the ICS.

2. Full costs are those related to producing a specific quantity of output. In this analysis, full costing is accomplished for instructional programs only. The assumption is that instruction is the production function of the Florida community colleges. Support costs are allocated to instructional cost centers based on "charge back" procedures or semester credit ratios. (See paragraph I below.) Full costs displayed in Report CA-3 are shown for each course offered by the college with summary costs for each level of aggregation.

E. The cost components for each cost center are as follows:

1. Personnel Expenditures - Includes personnel benefits as well as all other expenditures for personnel services. (See 500 series of accounts in Section 2 of Accounting Manual.) (Tuition Waivers, Account 598, are excluded.)

   A. Instructional
   B. Executive, Administrative, Managerial
   C. Professional/Specialist
   D. Support

   (For definitions of these categories, see instructions for Report CA-2.)

2. Supplies and Services Expenditures - Current Expense and Minor Equipment Account 705.

3. Equipment - Type 1, annual expenditures for equipment.
   Type 2, depreciation on equipment.

F. Distribution of Personnel Expenditures - The distribution of personnel expenditures and assignments is based on the principles found in Workform A - Personnel Assignments. The output of the system is the FTE positions and the personnel expenditures distributed to the cost centers of the ICS.

The following principles apply to the distribution of personnel expenditures and assignments:

1. Personnel expenditures include amounts expended by the college for salaries and employee benefits (e.g., social security, retirement, and insurance contributions).

2. The personnel expenditures and assignments of an individual are distributed to the cost centers and the personnel categories based on each assignment's proportionate share of the individual's total workload.

   The following diagram emphasizes the required procedure to distribute personnel assignments (and proportionate dollars) to both personnel categories and ICS categories:

| | Personnel Categories | | | |
|---|---|---|---|---|
| | Instruction | Exec., Admin., Man. | Professional/ Specialist | Support |
| ICS Categories | % of Assignment | % of Assignment | X | X |
| | % of Assignment | X | X | X |
| | X | X | X | X |

3. Instructional personnel expenditures and assignments are distributed to each course on the basis of the number of credit hours or equivalents taught and the percentage of an individuals assignment associated with the instruction function.

The following example illustrates the procedure to be used to distribute instructional personnel expenditures and assignments:

A. Salary + personnel benefits = $15,000
B. Annual full load standard is 42 credit hours
[15 Fall term, 15 Winter term, 12 Summer term (6 + 6)]

| Courses Taught | Discipline | Credit Hours | Expend. Distri. | FTE Posi. Distri. |
|---|---|---|---|---|
| Bio. 101 | 1.10.0400 Biol.Sci. | 15 | $6429 | .36 |
| Bio. 211 | 1.10.0400 Biol.Sci. | 8 | 3428 | .19 |
| Chem. 101 | 1.10.1900 Phys.Sci. | 12 | $5143 | .29 |
| Annual Total for this instructor | | 35 | $15,000 | .84 |

In this example each course that the person taught receives a share of the expenditures and FTE positions computed by taking the proportion that his workload was for each course times the total salary and total FTE, respectively.

For persons that have both teaching and non-teaching assignments, the expenditures distributed to the courses and those distributed to the other assignments should be based on a proration of the person's total workload. For example, a department chairman may have the following assignment distribution:

% for teaching equals 40% of the base salary and assignment.

% for department administration is 60% of the base salary and assignment.

Annual salary was $16,000 base plus a $1,000 supplement for department chairman duties.

Distribution:

to courses (teaching) - .4 FTE and $6,400
to Department Administration - .6 FTE and $10,600
($9,600 Base + $1,000 Supplement)

Note that the salary supplement is charged against the department administration activity and not against the teaching activity. The salary expenditure and FTE is then distributed to the individual courses as shown above.

The same procedure is used to distribute the salary expenditures and assignments of all persons who have multiple assignments including teaching.

4. Personnel expenditures and assignments for non-instructional professional (Executive, Administrative, Managerial and Professional/Specialist) activities are distributed to the ICS cost centers on the basis of a proportionate proration of assignments for an FTE position. Assume a person in the student personnel office with work assignments in counseling, placement services, and intramural programs was full-time for twelve months and was paid $12,000 (including personnel benefits). The following illustrates the distribution of personnel expenditures for the person.

| Subfunction | Assignment Proportion of FTE Position | Expenditures Distribution |
|---|---|---|
| 5.30 Counseling | .50 | $6,000 |
| 5.40 Placement | .30 | 3,000 |
| 5.10 Social and Cultural Development (intramurals) | .20 | 2,400 |

5. Personnel expenditures and assignments for support staff activities are distributed to the ICS cost centers using one of the following procedures:

   A. Distribute the expenditures and assignments based on an analysis of the workloads and assignments of each support staff using the procedures described in Workform A - Personnel Assignments.

   B. Distribute the expenditures and assignments in the same proportion as those of the professional staff in the departments in which the support positions are found or in the same proportion as the distribution of student semester hours (in instructional departments).

The following illustrates the use of option B to distribute support staff expenditures and assignments:

The Natural Science Department had the following distribution of professional staff assignments to the disciplines:

| Disciplines | Professional FTE Positions | % |
|---|---|---|
| Biological Science | 10.5 | 45 |
| Physical Science | 11.6 | 49 |
| Architectural and Environmental Design | 1.4 | 6 |
| TOTAL | 23.5 | 100% |

The distribution of two full-time equivalent support positions with a total salary of $14,250 would be as follows:

| Discipline | % Distribution | FTE Support Staff | Salary Distribution |
|---|---|---|---|
| Biological Science | 45 | .90 | $6412.50 |
| Physical Science | 49 | .98 | 6982.50 |
| Architectural and Environ. Design | 6 | .12 | 855.00 |
| TOTAL | 100% | 2.00 | $14250.00 |

This procedure may also be used for the distribution of support staff expenditures and positions for support departments; e.g., Learning Resources, Student Services, Executive Management, etc.

G. Distribution of Expenditures for Supplies and Services - This is a cost component which includes most of the current expense accounts in the Florida Community College Accounting Manual (pages 12-3 through 12-9). Account 680, Fee Waivers, is excluded from this part of the analysis.

1. Expenditures for supplies and services of departments should be distributed directly to the ICS cost centers if expenditures can be so identified and documented for audit purposes.

2. Expenditures for supplies and services of instructional departments that cannot be specifically identified with cost centers are distributed on the basis of student credit hours. The following example illustrates the procedure:

Assume you had a Social Science Department with expenditures of $3,000 for supplies and services. The disciplines supported by this department and the student credit hour (SCH) production were as follows:

| Discipline | SCH | % | $ Distributed |
|---|---|---|---|
| 1.10.2200 Social Science | 7380 | 70 | $2,100 |
| 1.10.2000 Psychology | 2910 | 27 | 810 |
| 1.10.0300 Area Studies | 312 | 3 | 90 |

3. Expenditures for supplies and services from non-instructional organizational units not specifically identified with cost centers are distributed in the same proportion as personnel expenditures. The following example illustrates this procedure:

> Assume a Counseling Department with $81,000 in personnel expenditures and $4,000 in expenditures for supplies and services. The personnel expenditures are distributed to the cost centers in the following manner:

| Cost Centers | Personnel Expenditures Distribution | % | Supplies & Services Expenditures Distribution |
|---|---|---|---|
| 5.10 Social & Cultural Development | $15,000 | 18 | $ 720.00 |
| 5.30 Counseling & Advisement | 46,000 | 57 | 2,280.00 |
| 5.40 Placement Services | 8,000 | 10 | 400.00 |
| 5.50 Financial Aid Administration | 12,000 | 15 | 600.00 |
| Total | $81,000 | 100% | $ 4,000.00 |

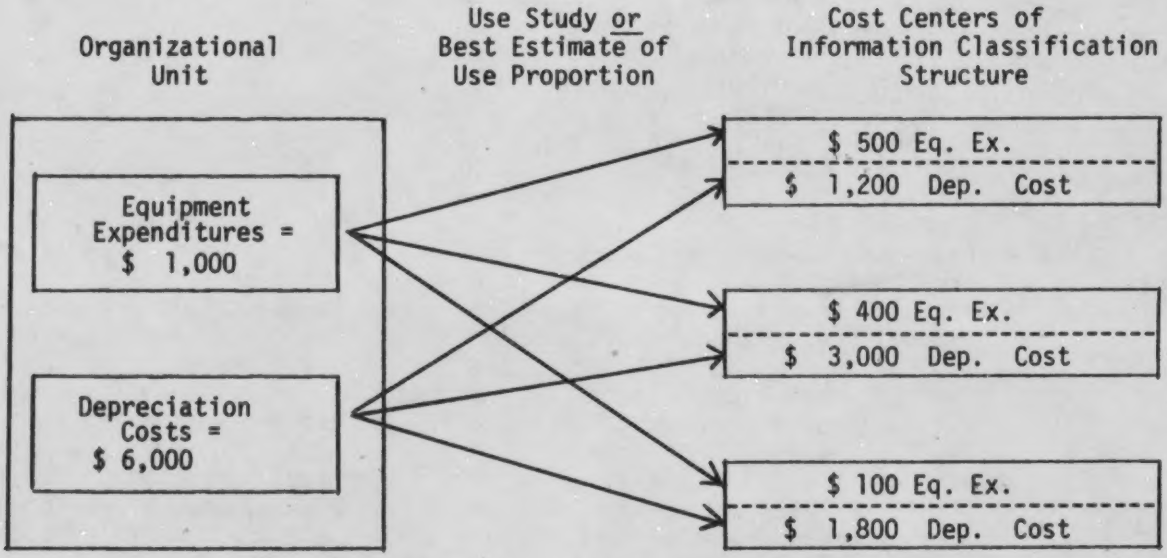
H. Equipment Expenditures and Depreciation Costs - Equipment expenditures are those made during the current fiscal year for equipment as defined in the Florida Community College Accounting Manual. This includes expenditures of Funds 1, 2, and 7 recorded in Accounts 710, Furniture and Equipment, and 730, Library Books and Films. Depreciation costs are derived by taking one-fifth (1/5) of the total expenditures for equipment purchased during the preceding five year period (including the year being analyzed) and is still inventoried and used by the college. Equipment expenditures and depreciation costs are both reported in Report CA-2. It should be noted that equipment expenditures are reported as an information item, whereas depreciation costs are used in the computation of full cost in Report CA-3.

In the performance of the Direct Cost study, both equipment expenditures and depreciation costs should be distributed from the organizational units (departments) with which they are identified to the cost centers of the ICS on one of the following bases:

1. A use study; or
2. If a use study is not conducted, the best estimate of use; or
3. If neither of these two methods are appropriate, distribute on the basis of a parameter that is most appropriate; i.e., student semester hours for instructional cost centers, full-time equivalent positions for support cost centers, etc.

One method is not specified as standard since in different situations any one of the methods may be preferable to the other two. A use study means that records are maintained on the amount of use made of certain equipment by activities within the cost centers of the ICS. The best estimate of use method means that the department administrator assigns a certain utilization of equipment to the cost centers supported by the department. The parameter method means that one selects a specific utilization parameter (SCH, FTE positions, etc.) which is used to distribute the cost of the equipment to the cost centers.

The following example illustrates the distribution of equipment expenditures and depreciation costs from one organizational unit to three cost centers (note that the proportions may be different for expenditures and depreciation):


Organizational Unit
Use Study or Best Estimate of Use Proportion
Cost Centers of Information Classification Structure
Equipment Expenditures = $ 1,000
Depreciation Costs = $ 6,000
$ 500 Eq. Ex.
$ 1,200 Dep. Cost
$ 400 Eq. Ex.
$ 3,000 Dep. Cost
$ 100 Eq. Ex.
$ 1,800 Dep. Cost

These procedures assume that each college has an inventory of equipment which accounts for each item by organizational unit or has records of expenditures for equipment by organizational unit. Since depreciation costs are based on a five-year, straight line depreciation schedule, equipment acquired (and still in use) during the past five years (including the year being costed) should be depreciated by one-fifth (1/5) of its purchase price. All equipment over five years old will be considered to have zero dollar value for costing purposes.

I. Allocation Procedures - Items F, G, and H above discussed the procedures for distribution of expenditures from the organizational structure for the ICS for direct cost purposes. Once this distribution is accomplished, it is possible to obtain full costs by allocating the expenditures of support functions to the instructional functions.

Support expenditures that can be associated with a particular instructional department, course, or group of courses should be allocated to these when conducting the full cost study. In other words, institutions maintaining usage records for "charge back" purposes should use such records for allocating support costs. These expenditures should be included in the college-wide costs for the specific courses in the CA-3 full cost report. Documentation of back-up records which support such allocations should be maintained for audit purposes. Other support costs should be allocated to instructional courses based on the semester credit loads of the various courses.

Equipment depreciation is allocated for Report CA-3, Full Cost of Instruction. Equipment expenditures for the current year are not included in the allocation procedure.

## Reports

Three reports are categorized as cost analysis reports:

CA-1, Identification of Operating Expenditures by Fund
CA-2, Direct Cost of Primary and Support Programs
CA-3, Full Cost of Instruction

# Identification of Operating Expenditures by Fund
## (CA-1)

### Purpose of the Report

This report is designed to identify the expenditures included in the analysis of operating expenditures. The data reported are to demonstrate that all deductions during the fiscal year under analysis from each fund maintained by the college have been taken into account in identifying expenditures that represent operating costs.

### Instructions

#### EXPENDITURES COLUMN HEADINGS

Personnel Expenditures - All expenditures recorded in the 500 series of accounts during the fiscal year under analysis.

Current Expense - All expenditures recorded in the 600 series of accounts during the fiscal year under analysis. Also included are expenditures for minor equipment if recorded in Account 705.

Capital Outlay - All expenditures recorded in the 700 series of accounts, except those in the 705 Minor Equipment Account, if used.

Total - The sum of the three types of expenditures reported in the columns.

#### REVENUE COLUMN HEADINGS

Federal - All revenue received from the federal government which can be used for current operating expenditures.

State - All revenue received from the State of Florida which can be used for current operating expenditures.

Student Fees - All revenue received from students which can be used for current operating expenditures.

Other - All revenue from other sources which can be used for current operating expenditures. Transfers-in are reported in this column.

Total - The sum of the four types of revenue reported in the columns.

#### ROW HEADINGS

General and Restricted Currend Funds - Record in these rows the expenditures and revenue actually recorded in the annual reports for the two funds.

Unexpended Plant Fund Expenditures and Revenues - Enter the revenues and expenditures recorded in general ledger accounts 710 - Furniture and Equipment and 730 - Library Books and Films.

Total Expenditures and Revenue in Annual Report - This row is simply the total of the General and Restricted Current Funds and general ledger accounts 710 and 730 of the Unexpended Plant Fund.

Transfers Out - Since transfers-out are not to be included in the cost analysis, provision is made to deduct them from the total expenditures for analysis. Transfers-in, however, should be added to the available revenue in the Other columns in the lower matrix.

Fiscal/Academic Year Adjustment - Enter in this row the net adjustment figure for the following situations:

A. The Instructional Personnel Expenditures made between the beginning of the fiscal year and the beginning of the academic year for courses which occurred in the preceding academic year are excluded, or deducted, in the adjustment.

B. The Instructional Personnel Expenditures made after the fiscal year has ended (in the subsequent fiscal year) for courses that begin in the academic year being costed should be included, or added, to the total expenditures for analysis.

Less Expenditures for Capital Outlay - All expenditures for the fiscal year for capital outlay as shown on row four. The purpose of this entry is to show that all capital outlay expenditures have been removed from the cost analysis system.

Plus Depreciation - The actual depreciation amount (total) which was used in the analysis. The purpose of this entry, along with the foregoing entry, is to show the net effect of using depreciation rather than equipment expenditures in the cost analysis.

Net Transfers - The purpose of this entry is to remove the amounts transferred into or out of the General Current Fund and the Restricted Current Fund from the analysis of expenditures.

Less Fee Waivers - The entry is used to remove the effects of fee waivers on the revenue or expenditures used in the analysis. The entries under revenue and expenditures should offset (equal) one another.

Less Off-Campus Work-Study Expenditures and Revenue - This entry is used to remove the effects of off-campus work-study revenue and expenditures in the analysis.

Less Non-Program Expenditures and Revenues - Exclude expenditures made and revenues received under the terms of a contract or agreement with a second party to make reimbursable payments for which the college receives no benefit in the form of goods or services and are not related to any program of the college. Examples are funds received from the federal or state government to conduct a study or perform a service for the benefit of the granting agency. In these cases the college is acting only as an agent for the flow of funds and thus receives no benefits or uses any resource related to the project. If however, the college receives any tangible benefits such as work services under CETA or student work study, the expenditures should not be excluded even though the expenditures are fully reimbursable under the terms of the agreement. Attach a separate schedule to the CA-1 report listing the source of funds and a brief description of the projects excluded from the cost analysis.

Report CA-1, IDENTIFICATION OF
OPERATING EXPENDITURES
BY FUND

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
Affirmative action/equal opportunity employer

Due Date: November 1

College:____________________

Prepared by:____________________

Date Prepared:____________________

Signature of Pres:____________________

| EXPENDITURES | Personnel Expenditures | Current Expense | Capital Outlay | Total |
|---|---|---|---|---|
| General Current Fund | | | | |
| Restricted Current Fund | | | | |
| Unexpended Plant Fund (710 & 730) | | | | |
| TOTAL Expenditures in Annual Report | | | | |
| Fiscal/Academic Year Adjustment | | ▨ | ▨ | |
| Less Transfers-Out | ▨ | | ▨ | |
| Less Expend. for Capital Outlay | ▨ | ▨ | | |
| Plus Depreciation | ▨ | ▨ | | |
| Less Fee Waivers | | | ▨ | |
| Less Off-Campus Work-Study Exp. | | ▨ | ▨ | |
| Less Non-Program Expend. | | | | |
| TOTAL Current Year Operating Expenditure for Analysis | | | | |

| REVENUE | Federal | State | Student Fees | Other | Total |
|---|---|---|---|---|---|
| General Current Fund | | | | | |
| Restrict. Curr. Fd. | | | | | |
| Unexpended Plant Fd. | | | | | |
| TOTAL Revenue in Annual Report | | | | | |
| Less Fee Waivers | ▨ | ▨ | | ▨ | |
| Less Off-Campus Work-Study Rev. | | ▨ | ▨ | | |
| Less Non-Program Rev. | | | ▨ | | |
| ADJUSTED REVENUE | | | | | |
| Percent of Total | | | | | |

Return to: Bureau of Research and Information Systems, Division of Community Colleges,
Department of Education, Tallahassee, Florida 32304

# Direct Cost of Primary and Support Functions
# (CA-2)

## Purpose of the Report

This report is designed to summarize the cost analysis findings and identify personnel resources utilized by a college during an academic year. It shows the direct cost of each institutional category and support subfunction. It also shows the number of full-time equivalent positions for each cost center and personnel assignment category. The form should be reconciled to CA-1 and CA-3 in the following manner:

A. The total expenditures reported in CA-2 equals the "Total Current Year Operating Expenditures for Analysis" in CA-1 and the total expenditures included in CA-3 (i.e., total Student Credit Hours times the weighted average cost/SCH for all courses).

B. The total direct "Instructional Expenditures" column in CA-2 equals the total "Instructional Personnel Expenditures" reported in CA-3.

C. The total of all expenditures included in Part 1 - Instruction of the CA-2 report equals the expenditures included in the "Instructional Personnel Expenditures" plus "Other Instructional Expenditures" columns of CA-3 (Equipment depreciation only is used from CA-2 to make this reconciliation).

D. The total expenditures in Part 2 - Support Functions of the CA-2 report equals the total expenditures included in the "College-Wide Expenditures" column of CA-3 (Equipment depreciation only is used from CA-2 to make this reconciliation).

## General Instructions for the Distribution of Personnel Assignments and Expenditures:

This report includes a distribution of expenditures and personnel assignments for all full-time and part-time employees of the college. To insure comparability of the information reported it is necessary that distribution of cost and assignments be derived from the same analysis and/or procedures so that both the dollars and assignments fall into the same functional and personnel categories. The suggested procedures shown in the sample workforms for the personnel assignments provide detail guidelines which colleges should use to distribute expenditures and assignments. As these workforms indicate, the assignments of each professional staff position should be analyzed and distributed to the appropriate cost centers of the ICS.

It is important to note at this point that the standards used to compute full-time equivalent positions are not intended to dictate institutional policy, rather they provide only a uniform basis for computation of full-time equivalent positions for reporting.

The following are the procedures which are to be followed in determining the full-time equivalent positions which are reported for each category of personnel in the CA-2 report:

Instructional Assignments and FTE Positions - A full-time equivalent (FTE) instructional position is defined as the equivalent of one person carrying a full workload for the entire academic year (three semesters). The following standards are applied to computations of instructional FTE positions:

1. The basic units to be used to compute the FTE position are usually the credit hour of instruction and its equivalent for non-credit courses. One (1) full-time equivalent instructor equates to a standard faculty workload of 42 credit hours of instruction for the academic year (15 Fall + 15 Winter + 12 Summer). In equating faculty workloads for non-credit courses, 27 contact hours of instruction equates to one (1) credit hour.

2. The credit hour of instruction is not a good measure of faculty workload for some credit courses; e.g., laboratory courses, physical education courses, individual music lessons, etc. In these cases, and only in these cases, use the instructional contact hour as the standard; i.e., 15 instruction hours in the Fall + 15 in the Winter + 12 in the Summer equate to one (1) FTE position.

3. In some colleges adjustments are made to faculty workloads for very large sections (multiple sections meeting at the same time and place). It is permissable in these exceptional cases to use the college's definition of a full workload in the computation of a FTE instructional position.

If one wishes to convert to an academic year (two semesters) base of 30 credit hours, they can simply multiply the reported FTE positions by 1.4. However, to have consistent reporting from all colleges the 42 credit hour standard shall be used in this report.

The Academic Year is not compatible with the various contractual arrangements which colleges have with their instructional employees, but it is necessary to use the standard year to obtain comparable information. Each part-time personnel should be treated in the same manner as full-time personnel; i.e., their proportionate FTE assignment should be distributed to the appropriate cost centers (disciplines).

Instructional Function - Administrative or Managerial Assignments and FTE Positions - This category of personnel assignments include those made for administration or management of instruction departments, divisions, or organizational units. The standard for an FTE administrator is defined as 252 days per year and a normal workweek (usually 37.5 or 40 hours). As was done for the instructional faculty, the assignments for administrative or managerial purposes should be distributed to the appropriate cost centers (disciplines) of the ICS. Those administrative assignments that are associated with release time from instructional duties should also be included and costed as administrative-managerial positions.

Instructional Function - Support FTE Positions - This includes assignments which are classified as supportive in nature (e.g., clerical, secretarial, etc.) and are in instructional departments or organizational units. For support personnel assignments it is acceptable to distribute the proportionate FTE and expenditures to the various cost centers of the ICS on the basis of the distribution of instructional and administrative personnel. In other words, the total full-time equivalent support positions in the instructional program may be distributed to each of the disciplines based upon the distribution of the professional staff. Thus, it is not necessary to analyze the individual assignments of each of the support personnel in the instructional area. The standard for FTE support positions is defined as 252 days per year and a normal workweek (usually 37.5 or 40 hours).

Support Function - Executive, Administrative and Managerial Assignments and FTE Positions - This includes assignments with the primary duty of planning, organizing, and managing organizational units other than those directly related to instruction. In many colleges, individuals will have assignments which cut across functional and personnel category lines; e.g.,

1. a person, or position, may have assignments which are related to different subfunctions in the support area.

2. a person, or position, may have assignments in two different personnel categories; i.e., executive, administrative, managerial and non-instructional professional.

In these cases, the expenditures and proportionate FTE should be distributed to the appropriate subfunction and personnel categories. In all cases the dollars associated with the expenditures to perform the assignments should be distributed to the same subfunction and personnel category. The FTE is computed on the basis of 252 days per year and a normal workweek (usually 37.5 or 40 hours).

Support Function - Professional/Specialist Assignments and FTE Positions - This includes those assignments which require knowledge and competence of an advanced nature but which are not administrative or instructional. This includes assignments to professional personnel staff for such activities as counseling, curriculum development, research, accounting, library work, etc. It is important to note again that the distribution of assignments of individual staff members is based on a review and proper placement of each unique assignment, rather than on the basis of the individual's primary duty or assignment. The full-time equivalent position is based on 252 days per year and a normal workweek (usually 37.5 or 40 hours).

Support Function - Support Staff Assignments and FTE Positions - These are assignments which are classified as supporting in nature; e.g., paraprofessional, clerical, secretarial, technical, custodial, and general services. As in the instructional area the distribution of support staff assignments can be based upon the distribution of administrative, executive, managerial and non-instructional professional staff distribution pattern. However, in certain areas this may not be appropriate; e.g., physical plant operations and maintenance. The FTE position is based on 252 days per year and a normal workweek (usually 37.5 or 40 hours).

## Instructions

### Part 1, INSTRUCTION

FTE Positions should be reported to two decimal places; e.g., 1.11.

Information Classification Structure - The instructional and support cost centers are defined in Section 2 of this manual.

Instructional Cost - The personnel expenditures for direct teaching assignments; i.e., teaching organized and scheduled courses reported in the Instructional Personnel expenditures column of CA-3.

Administrative, Managerial Cost - The personnel expenditures for departmental administrative assignments. Salary supplements (additives), release time, and any other forms of compensation for managing the activities in this cost component are to be included.

Administrative, Managerial FTE Positions - This column includes the number of FTE assignments with the primary duty of planning, organizing, and managing departments, organizational units, and/or personnel in instructional departments and divisions.

Support - The personnel expenditures made to paraprofessional, secretarial, clerical, etc. persons assigned to and supporting instructional departments.

Support FTE Positions - Include in this column the number of FTE assignments which are classified as supportive in nature; e.g., paraprofessional, clerical, secretarial, etc.

Supplies and Services - The expenditures accounted for in current expense accounts and which are made by instructional departments or equivalent organizational units.

Depreciation Cost - One-fifth of the total cost of equipment purchased by the college within the past five years which is still inventoried and used by the college. The Equipment Depreciation Cost reported in Part 1 of CA-2 is developed from instructional department equipment depreciation and expenditures.

Expenditures - The equipment expenditures made during the year under analysis for instructional departments (700 series of accounts). NOT USED IN FULL COST DETERMINATION for CA-3.

Federal Funds Expenditures - Include in this column all expenditures made from any Federal fund source. Since these expenditures are included in the preceding columns, the column is a memorandum item and is non-additive for total direct cost purposes.

Part II, SUPPORT FUNCTIONS

Executive, Administrative, Managerial Expenditures - The personnel expenditures to persons for conducting assignments related to planning, organizing, and managing the college or subdivision or service of the college. The following are examples of positions with assignments usually belonging in this category:

> President; assistant to the president; vice president; chief academic officer, chief business officer; chief student personnel officer, chief librarian, planning officer; public relations officer; managers of admissions, alumni affairs, athletics, budgets, computer center, food services, personnel services, physical plant, counseling, financial aid, placement, bookstore, purchasing, and community services; comptroller; legal counsel; registrar.

Executive Administrative, Managerial FTE - This column includes the number of FTE assignments for planning, organizing, and managing departments, organizational units, or service units.

Professional/Specialist Expenditures - The personnel expenditures to persons for conducting assignments that require knowledge and competence of an advanced nature in a field of science or learning, or original and creative work in an artistic field. A baccalaureate degree is usually but not always required. Examples are assignments such as counseling, curriculum development, learning resources, accounting, and research.

Professional/Specialist FTE - This column includes the number of FTE assignments which require knowledge and competence of an advanced nature, but which are not instructional or administrative. Note that this column is included only on Part 2 - Support Functions.

Support Staff Expenditures - The personnel expenditures made to paraprofessional, secretarial, clerical, office, trade, semi-skilled, custodial, and other general services personnel.

Support FTE - Include in this column the number of FTE assignments which are classified as supportive in nature; e.g., clerical, secretarial, technical, custodial, general service, etc.

Other Columns - The instructions for reporting the Supplies and Services, Depreciation Cost, Equipment Expenditures, and Federal Funds Expenditures columns are the same as for the equivalent columns in Part 1.

Prepared by: ____________________

Date Prepared: ____________________

COLLEGE: ____________________

# DIRECT COST
## PRIMARY AND SUPPORT FUNCTIONS
## PART 1
## INSTRUCTION

6.18

| INFORMATION STRUCTURE CATEGORIES | PERSONNEL EXPENDITURES AND POSITIONS | | | | | | Supplies and Services | EQUIPMENT | | Federal Funds Expenditures |
|---|---|---|---|---|---|---|---|---|---|---|
| | Instructional | | Administrative Managerial | | Support | | | Depreciation Cost | Expenditures | |
| | Expenditure | FTE Pos. | Expenditure | FTE Pos. | Expenditure | FTE Pos. | | | | |
| 1.1 Advanced & Professional | | | | | | | | | | |
| 1.11.01 Agric. & Nat. Res. | | | | | | | | | | |
| 1.11.02 Archit. & Environ. | | | | | | | | | | |
| 1.11.04 Biological Science | | | | | | | | | | |
| 1.11.09 Engineering | | | | | | | | | | |
| 1.11.12 Health Professions | | | | | | | | | | |
| 1.11.19 Physical Sciences | | | | | | | | | | |
| 1.12.10 Fine and Applied Arts | | | | | | | | | | |
| 1.13.11 Foreign Languages | | | | | | | | | | |
| 1.13.15 Letters | | | | | | | | | | |
| 1.14.08 Education | | | | | | | | | | |
| 1.15.05 Business & Management | | | | | | | | | | |
| 1.16.07 Computer & Infor. Sci. | | | | | | | | | | |
| 1.16.17 Mathematics | | | | | | | | | | |
| 1.17.03 Area Studies | | | | | | | | | | |
| 1.17.20 Psychology | | | | | | | | | | |
| 1.17.22 Social Sciences | | | | | | | | | | |
| 1.18.06 Communications | | | | | | | | | | |
| 1.18.13 Home Economics | | | | | | | | | | |
| 1.18.14 Law | | | | | | | | | | |
| 1.18.16 Library Science | | | | | | | | | | |
| 1.18.18 Military Science | | | | | | | | | | |
| 1.18.21 Public Affairs | | | | | | | | | | |
| 1.18.23 Theology | | | | | | | | | | |
| 1.18.49 Interdisciplinary | | | | | | | | | | |
| Total Advanced and Professional | | | | | | | | | | |

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Page 1 of 5

# DIRECT COST

COLLEGE: ____________________

## PRIMARY AND SUPPORT FUNCTIONS

## PART 1, INSTRUCTION (CONTINUED)

| INFORMATION STRUCTURE CATEGORIES | PERSONNEL EXPENDITURES AND POSITIONS | | | | | | Supplies and Services | EQUIPMENT | | Federal Funds Expenditures |
|---|---|---|---|---|---|---|---|---|---|---|
| | Instructional | | Administrative Managerial | | Support | | | Depreciation Cost | Expenditures | |
| | Expenditure | FTE Pos. | Expenditure | FTE Pos. | Expenditure | FTE Pos. | | | | |
| 1.2 Occupational | | | | | | | | | | |
| 1.2100 Agriculture<br>1. Technical<br>2. Skilled/Semi-skilled<br>3. Supplemental | | | | | | | | | | |
| 1.2200 Distributive<br>1. Technical<br>2. Skilled/Semi-skilled<br>3. Supplemental | | | | | | | | | | |
| 1.2300 Health<br>1. Technical<br>2. Skilled/Semi-skilled<br>3. Supplemental | | | | | | | | | | |
| 1.2400 Home Economics<br>1. Technical<br>2. Skilled/Semi-skilled<br>3. Supplemental | | | | | | | | | | |
| 1.2500 Office<br>1. Technical<br>2. Skilled/Semi-skilled<br>3. Supplemental | | | | | | | | | | |
| 1.2600 Trade and Industrial<br>1. Technical<br>2. Skilled/Semi-skilled<br>3. Supplemental | | | | | | | | | | |
| 1.2700 Public Service<br>1. Technical<br>2. Skilled/Semi-skilled<br>3. Supplemental | | | | | | | | | | |
| TOTAL OCCUPATIONAL | | | | | | | | | | |

Page 2 of 5 CA-2

COLLEGE: ____________________

# DIRECT COST

## PRIMARY AND SUPPORT FUNCTIONS

## PART 1, INSTRUCTION (CONTINUED)

6.20

| | PERSONNEL EXPENDITURES AND POSITIONS | | | | | | Supplies and Services | EQUIPMENT | | Federal Funds Expenditures |
|---|---|---|---|---|---|---|---|---|---|---|
| | Instructional | | Administrative Managerial | | Support | | | Depreciation Cost | Expenditures | |
| INFORMATION STRUCTURE CATEGORIES | Expenditure | FTE Pos. | Expenditure | FTE Pos. | Expenditure | FTE Pos. | | | | |
| 1.3 Developmental<br>1.3100 Compensatory<br>1.3200 Adult Elemen. & Secondary | | | | | | | | | | |
| 1.3 Total Developmental | | | | | | | | | | |
| 1.4 Community Instruct. Serv.<br>1.4100 Citizenship<br>1.4200 Recreational & Leisure Time | | | | | | | | | | |
| 1.4 Total Comm. Instruc. Services | | | | | | | | | | |
| TOTAL INSTRUCTION | | | | | | | | | | |

CA-2
Page 3 of 5

## DIRECT COST

COLLEGE: ____________________

### PRIMARY AND SUPPORT FUNCTIONS

### PART 2, SUPPORT FUNCTIONS

| INFORMATION STRUCTURE CATEGORIES | PERSONNEL EXPENDITURES | | | | | | Supplies and Services | EQUIPMENT | | Federal Funds Expenditures |
|---|---|---|---|---|---|---|---|---|---|---|
| | Executive, Adminis., Managerial | | Professional/ Specialist | | Support | | | Depreciation Cost | Expenditures | |
| | Expenditure | FTE Pos | Expenditure | FTE Pos | Expenditure | FTE Pos | | | | |
| 2.0 Research | | | | | | | | | | |
| 3.0 Public Service<br>3.1000 Community Services | | | | | | | | | | |
| 4.0 Academic Support<br>4.1000 Learning Resources<br>4.4000 Instruc. Comput. Serv.<br>4.5000 Ancillary Operations<br>4.6000 Academic Administration<br>4.7000 Course & Curri. Develop.<br>4.8000 Prof. Person. Develop. | | | | | | | | | | |
| Total Academic Support | | | | | | | | | | |
| 5.0 Student Service<br>5.1000 Social & Cultural Develop.<br>5.2000 Organized Athletics<br>5.3000 Counseling & Advisement<br>5.4000 Placement Services<br>5.5000 Financial Aid Adminis.<br>5.6000 Student Records & Admis.<br>5.7000 Health Services<br>5.8000 Serv. for Spec. Students<br>5.9000 Student Serv. Adminis. | | | | | | | | | | |
| Total Student Service | | | | | | | | | | |

6.21

CA-2
Page 4 of 5

## DIRECT COST

COLLEGE: ____________________

### PRIMARY AND SUPPORT FUNCTIONS

### PART 2, SUPPORT FUNCTIONS (CONTINUED)

| INFORMATION STRUCTURE CATEGORIES | PERSONNEL EXPENDITURES | | | | | | Supplies and Services | EQUIPMENT | | Federal Funds Expenditures |
|---|---|---|---|---|---|---|---|---|---|---|
| | Executive, Adminis. Managerial | | Professional/ Specialist | | Support | | | Depreciation Cost | Expenditures | |
| | Expenditure | FTE Pos. | Expenditure | FTE Pos. | Expenditure | FTE Pos. | | | | |
| 6.0 Institutional Support | | | | | | | | | | |
| 6.1000 Executive Management | | | | | | | | | | |
| 6.2000 Fiscal Operations | | | | | | | | | | |
| 6.3000 General Admin. and Logistical Services | | | | | | | | | | |
| 6.6000 Admin. Support Staff Serv. | | | | | | | | | | |
| 6.7000 Community Relations | | | | | | | | | | |
| Total Institutional Support | | | | | | | | | | |
| 7.0 Physical Plant Operation and Maintenance | | | | | | | | | | |
| 8.0 Work-Study & Other Student Assistantship Programs | ▨ | ▨ | ▨ | ▨ | | | ▨ | ▨ | ▨ | |
| TOTAL SUPPORT | | | | | | | | | | |

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
Affirmative action/equal opportunity employer

# Full Cost of Instruction
# (CA-3)

## Purpose of the Report

The report is designed to display the full cost of instruction for each course offered by the college, with summary costs for each instructional category (discipline) and subcategory. While Report CA-2 shows the direct costs of all activities carried on by the college, Report CA-3 shows the cost of producing semester credits of instruction with support costs allocated to the courses and shown as the college-wide component of full cost.

Any support function expenditure that can be associated with a particular instructional department or group of courses should be allocated to the department or courses. These costs, however, should be included in the college-wide costs of the CA-3. All other support program expenditures should be allocated to instructional courses based on the proportionate semester credit loads of the various courses

## Instructions

ICS Code - In the first column place the ICS code for each course and aggregation level. For each occupational course designate the level of instruction as follows:

T for Technical courses
V for Skilled/Semi-skilled
S for Supplementary courses

Prefix - The Prefix column will show the course prefix assigned the course by Statewide Course Numbering.

Number - The Number column will show the course number assigned the course by Statewide Course Numbering.

Course Title - The Course Title column will show the course title assigned the course by the college.

The following example shows the reporting format applied to the first five columns of the Advanced and Professional Subfunction.

| ICS Code | Course Number | | Course Title | SSH |
|---|---|---|---|---|
| | Prefix | Number | | |
| 1.1 | | | ADVANCED AND PROFESSIONAL | |
| 1.11.04 | | | Biological Science | |
| 0401 | BSC | 1010 01 | General Biology | 5046.0 |
| 0401 | BSC | 1010 L 01 | General Biology Lab. | 847.0 |
| 0401 | | 1011 C 01 | General Biology II | 279.0 |
| 0401 | BSC | 1011 L 01 | General Biology II Lab. | 94.0 |
| 1.11.04 | | | Total Biological Science | 6266.0 |
| | | | TOTAL ADV. AND PROF. | 6266.0 |

For Occupational courses, it is necessary to report a lower level of aggregation. Courses should be grouped by Technical (T), Skilled/Semi-skilled (V), and Supplemental (S) within each ICS Category (refer to page 2.3), such as Forestry, Transportation, Dental, Nursing, Commercial Art, Electronics, etc. Subtotals should be provided for each T, V, S group as illustrated in the example below.

| ICS Code | Course Prefix | Number Number | Course Title | SSH |
|---|---|---|---|---|
| 1.2 | | | OCCUPATIONAL | |
| 1.23 | | | Health Occupations | |
| 1.23.03 | | | Nursing - Technical | |
| 1.23.0301 T | NUR | 1140 C 01 | Fundamentals of Nursing | 780.0 |
| 1.23.0301 T | NUR | 2110 C 01 | Maternity Nursing | 400.0 |
| 1.23.0305 T | NUR | 1011 C 01 | Medical and Surgical Nursing | 570.0 |
| | | | Total Technical | 1750.0 |
| | | | Nursing - Skilled/Semi-skilled | |
| 1.23.0302 V | NUR | 2120 C 01 | Nursing of Children | 234.0 |
| 1.23.0302 V | NUR | 2310 C 01 | Mental Health Nursing | 253.0 |
| | | | Total Skilled/Semi-skilled | 487.0 |
| | | | Nursing - Supplemental | |
| 1.23.0302 S | NUR | 2905 01 | LPN Refresher | 10.1 |
| | | | Total Supplemental | 10.1 |
| 1.23.03 | | | Total Nursing | 2247.1 |
| 1.23.08 | | | Mental Health - Technical | |
| 1.23.0801 T | MHT | 1010 01 | Intro. to Mental Health | 219.0 |
| 1.23.0801 T | MHT | 2122 01 | Psychotherapy | 69.0 |
| | | | Total Technical | 288.0 |
| 1.23.08 | | | Total Mental Health | 288.0 |
| | | | Total Health Occupations | 2535.1 |
| | | | TOTAL OCCUPATIONAL | 4772.1 |
| | | | TOTAL INSTRUCTION | 11038.1 |

Subtotals and weighted averages for SSH, Instructional Personnel Expenditures, Other Instructional Expenditures, College-Wide Expenditures, Total Operating Costs Per Semester Credit and Per FTE Student are required for each ICS Category - Nursing, Mental Health, etc., as well as the higher levels such as Health, Occupational and Total Instruction.

Semester Hour (Student Semester Hours - SSH) - Enter the semester credit hours and equivalents registered for in all terms of the academic year under analysis. Enter according to the standard procedures for enrollment accounting from Report FA-4, FTE Enrollment Report (Student Semester Hours). The semester hours reported on CA-3 must equal those reported on FA-4 for each discipline and cluster. When necessary carry these out to one decimal place.

Instruc. Pers. Expend.- Enter the unit cost attributable to Instructional Personnel Expenditures. The unit cost is obtained by dividing the number of semester hours into the expenditures for instructional personnel.

Other Instruc. Expend.- Enter the unit cost attributable to Other Instructional Expenditures related to instructional departments:

Administrative, Managerial Personnel Expenditures
Support Personnel Expenditures
Supplies and Services
Equipment Depreciation Cost

Unit cost is obtained by dividing the number of semester hours into the sum of the above four types of expenditures.

College-Wide Expend.- Enter the unit cost attributable to expenditures for support programs. The unit cost is obtained by dividing the number of semester hours into the total expenditures allocated from support programs.

Per Semester Hour - Enter the sum of the entries in the Cost/Student Hour Columns.

Per FTE Student - Enter the result of multiplying the cost per semester hour by thirty (the FTE unit value).

Report CA-3, FULL COST OF INSTRUCTION
(4/74)
Page ___ of ___

Due Date: November 1

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
Affirmative action/equal
opportunity employer

College ______________________

Prepared by ______________________

Date Prepared ______________________

Signature of Pres. ______________________

| Discipline/Course | | | | | Cost/Semester Hour | | | Total Operating Costs | |
|---|---|---|---|---|---|---|---|---|---|
| ICS Code | Course | | Course Title | Student Semester Hours | Instruc. Pers. Expend. | Other Instruc. Expend. | College Wide Expend. | Per Semester Credit | Per FTE Student |
| | Pre. | No. | | | | | | | |
| | | | | | | | | | |

# Sample Workforms

## Purpose of Sample Workforms

The following pages include sample workforms which can be used to collect and analyze expenditure data for the cost analysis system. These forms and procedures are very general. Each institution will want to develop its own forms and procedures according to its policies and depending on what it desires out of the system. In some cases colleges have most or all of the required information in their computer data base and with only slight modifications or additions can develop the analytical reports needed without having to implement a large data collection task.

## WORKFORM A

## Personnel Assignments

### Purpose of the Workform

This workform provides a means of collecting basic data to analyze the workloads of individuals employed by the college. It also contains the information necessary to crosswalk personnel and salary data between the organizational unit structure and the program structure.

### Instructions and Definitions

I.D. Number - This is a number (code) which identifies the employee.

Account Number - This is the budgetary department or organizational unit number from which the individual was paid.

Contract Type - This is a code for the type of contract which the individual holds with the college (institutionally defined).

Part-Time - This field is used to record the percentage of a full-time equivalent position for part-time personnel.

Reporting Period(s) - This is used to record the term(s) or other time frame used for the report.

Basic Salary - This field is used to record the salary paid for performance of the assignments made to the individual. If additives are given to persons for the performance of specific assignments, they should not be included in the basic salary.

Additives - Record in this field the amount of the salary additives paid persons for specific assignments listed on the form.

## Teaching Assignments

(A) Course ID - This column is used to record the specific identification for each course section taught by the individual, prefix or department, course number, and section number.

(B) Credit Value - Enter the number of semester credit hours assigned to this course or the number of credit hour equivalents computed for the course. A credit hour equivalent is calculated by dividing the number of clock hours of instruction for the course by 27.

(C) Weekly Course Contact Hours - Enter the number of hours per week that a course is scheduled to meet. If a course meets for a portion of a term, enter the average weekly contact hours computed by dividing the weeks in the term into the total contact hours.

(D) Method of Instruction - Enter the methods used for instruction for the course (institutionally defined).

(E) Enrollment - Enter the number of students enrolled in the course section. This enrollment figure should be verifiable from official college records since it was used as the basis for funding.

(F) % of Assignment - This is the percent of a full instructional load which this course represents.

(G) ICS Code - This is the ICS Code which identifies the course with a specific HEGIS discipline or USOE category.

(H) Account Number - This is used only when a person is paid from an account other than that recorded at the top of the form. Otherwise it can be left blank.

The entry of other types of data on this form is optional. For example, the building and room and class meeting times could be entered if they could not be obtained easily from another file. As mentioned earlier, if good data bases are developed for the student record, course record and personnel systems, most of this data will be available on existing computer files. Therefore, what is shown here is strictly a manual approach.

## Other Instructional Related Assignments

(I) Assignment Description - Enter in this column a brief description of the assignment; e.g., department administration (or chairman), student advisement, etc.

(J) ICS Code - Enter the appropriate subfunction and discipline category code for which the assignment was made.

(K) Personnel Category - Enter the code for the personnel assignment category.

A. Executive, Administrative, Managerial
B. Non-Instructional Professional
C. Support

(L) % of Assignment - Enter the percent of an annual full-time assignment represented by this assignment.

(M) Additive Amount - Enter the amount of any additive paid the individual for carrying out this assignment.

(N) Account Number - Enter the account number of the department or organization unit from which a person was paid if other than that listed above.

### Assignments Other Than Instruction

(O) Assignment Description - Enter in this column a brief description of the assignment. It could also be used as a place for entering position title or class.

(P) ICS Code - Enter the appropriate ICS function and subfunction code for each assignment.

(Q) Personnel Category - Enter the code for the personnel assignment category.

(R) % of Assignment - Enter the percent of an annual full-time assignment represented by this assignment.

(S) Additive - Enter the amount of any additive paid the individual for carrying out this assignment.

(T) Account Number - Enter the account number of the department or organization unit from which a person was paid if other than that listed above.

## PERSONNEL ASSIGNMENTS WORKFORM A

Name of Individual

ID Number

Account Number

Contract Type

Part-Time

Reporting Period(s)

Basic Salary

Additives

Total Annual FTE

### TEACHING ASSIGNMENTS

| Course ID (A) | | | Credit Value (B) | | Weekly (C) Course Contact Hours | Method (D) of Inst. | (E) Enroll | (F) % of Assign | (G) ICS Code | (H) Acct. # |
|---|---|---|---|---|---|---|---|---|---|---|
| Pre (Dept) | No. | Sect. | Cr/Hrs. | Cr/Hr Eq. | | | | | | |
| | | | | | | | | | | |

### OTHER INSTRUCTIONAL RELATED ASSIGNMENTS

| Assignment Description (I) | ICS Code (J) | Personnel Category (K) | % of Assign. (L) | Additive Amount (M) | Account No. (N) |
|---|---|---|---|---|---|
| | 1._ _._ _ | | | | |
| | 1._ _._ _ | | | | |
| | 1._ _._ _ | | | | |
| | 1._ _._ _ | | | | |
| | 1._ _._ _ | | | | |

### ASSIGNMENTS OTHER THAN INSTRUCTION

| Assignment Description (O) | ICS Code (P) | Personnel Category (Q) | % of Assign. (R) | Additive Amount (S) | Account No. (T) |
|---|---|---|---|---|---|
| | _._ _ | | | | |
| | _._ _ | | | | |
| | _._ _ | | | | |
| | _._ _ | | | | |
| | _._ _ | | | | |

# WORKFORM B

## Direct Instructional Cost by Course

### Instructions and Definitions

The data taken from Workform A - Personnel Assignments, Teaching Assignments, is sorted by course within discipline within cluster. This makes it possible to compute instructional salary course costs by aggregating all course section salary expenditures and to obtain totals for each discipline and cluster. This will place the courses in the same order as required for Report CA-3.

Course/Discipline - In this column print the title of the course, course prefix and number, and program code (all 7 digits).

Columns a through d - For each course, print the data taken from the Teaching Assignment portion of Workform A.

Column e - Compute and print the weighted average cost for instructional salaries for each course, discipline, and cluster. This is simply the sum of the expenditures, column d, divided by the sum of the student credit hours.

Workform B

### DIRECT INSTRUCTIONAL COST
### BY COURSE

| Course/Cluster | | a | b | c | d | e |
|---|---|---|---|---|---|---|
| **Name** | **Number** | Instructor | No. of Students | Stu Sem Hours of Credit | Teaching Salary Expend. | Teaching Salary Cost/Stu. Sem. Hour |

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# WORKFORM C AND D

## Personnel Analysis by Organizational Unit and Function

### Purpose of Workforms C and D

These workforms provide the crosswalk between the organizational structure and the ICS. On Workform C, personnel resources (FTE positions by type) and expenditures are displayed by function within organizational unit. Therefore, one has a picture of how functions contribute or relate to the organizational structure. Workform D shows the same data displayed by organizational unit within function. With this perspective, it is possible to see how organizational units support specific functions.

The sum of the salaries for each organizational unit shown on Workform C should be matched to actual figures reported in the accounting system (Department Ledger Report) for the same time period.

## Personnel Analysis by Organizational Unit

Personnel Assignment Categories

| Organizational Unit | Function | Instructional | | Exec., Adm, Man. | | Other Prof. | | Support | | Total | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | No. | Salaries | No. | Salaries | No. | Salaries | No. | Salaries | % | Amount |
| | | | | | | | | | | | |

1. General Description - The number of FTE and the total salary expenditures for each personnel assignment category is displayed by function within Organizational units. The percentage of the organizational units expenditures which are distributed to each cluster is shown in the last column.

2. This report can be used to verify that the expenditures distributed to the function balance with the expenditures recorded in the financial accounting system by organizational unit.

3. Detail is by Discipline.

4. Totals are printed for discipline, subfunction, function, Organizational Units, and Funds.

## Personnel Analysis by Function

WORKFORM D

Personnel Assignment Categories

| Function | Organizational Unit | Instructional |  | Exec. Admin. Man |  | Other Prof. |  | Support |  | % to Organ. Unit |
|---|---|---|---|---|---|---|---|---|---|---|
|  |  | No. | Salaries | No. | Salaries | No. | Salaries | No. | Salaries |  |

1. General Description - The number of FTE and the total salary expenditure for each personnel assignment category is displayed by organizational unit within HEGIS discipline category for instructional function and within subfunction for all other functions. The percent of the function expenditure represented by each contributing organizational unit is computed and displayed.

2. Detail is by organizational unit.

3. Totals are printed for clusters, subfunctions, and functions.

# WORKFORM E

## Distribution of Expenditures for Supplies and Services to the Information Classification Structure

### Purpose of Workform E

This step in the cost analysis process is designed to move or crosswalk expenditures for supplies and services from the institutional organizational structure to the ICS cost centers. Where Workforms C and D accomplished this for salaries, this workform will crosswalk expenditures for supplies and services to the ICS.

### Procedures and Definitions

Column (a) Salaries - This entry is obtained from Workform C. It is the sum of the salaries (all types) for each instructional discipline and support subfunction distributed from each organizational unit.

Column (b) Supplies and Services - The expenditures for supplies and services are distributed to each function in the same proportion as salary expenditures. The total for each organizational unit should match the actual expenditures shown in the Departmental Ledger Report of the accounting system.

# Workform E

## Distribution of Expenditures for Supplies and Services to the Program Structure

| Organizational Unit | Function | Salaries | | Supplies & Ser. | |
|---|---|---|---|---|---|
| | | % | Amount | % | Amount |

# WORKFORM F

## Equipment Distribution

### Purpose of Workform F

This workform is used to calculate and distribute the current year expenditures and depreciation on equipment. It is completed or printed for each organization unit and the distribution is made to each function within the organizational unit.

### Procedures and Definitions

Both current year expenditures and depreciation of equipment costs are distributed from the organizational structure to the ICS using one of the following methods:

1. A use study which analyzes the time or extent of the use of specific equipment by each function supported by an organizational unit.
2. The best estimate of use according to the supervisor of the organizational unit.
3. A parameter used to distribute among functions; e.g., student credit hours, number of professional staff, net assignable square feet, etc.

Column (a) Equipment Costs Current Year - These are the expenditures made during the academic year being studied.

Column (b) Equipment Depreciation - A five-year straight line depreciation is used for all equipment acquired before the end of the academic year being analyzed. This amount is computed by dividing the cost of equipment purchased during the five-year period (including the current year) by five. Equipment purchased prior to this time is not included in the cost analysis.

# Workform F

## Equipment Distribution

| Organizational Unit | Function | (a)Equipment Costs Current Year | (b)Equipment Deprec. |
|---|---|---|---|
| | | | |

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## SECTION 7

## STUDENT FEES AND FEE WAIVER REPORT
## (FW-1)

### Purpose of the Report

There is considerable legislative and other interest in fees charged, as well as waived for students. The Student Fees and Fee Waiver Report (FW-1) displays information about fees waived in various categories, fee waiver policy and a schedule of student fees.

### Instructions for Report (FW-1)

The information for this report is developed in September of each year and (represents all fees waived in the prior fiscal year, the fee waiver policy of the college related to these fee waivers and a schedule of student fee charges for the current (as of October 1) academic year.) is subdivided into three parts which are briefly described below:

Part 1 - Fee Waiver Report - This part represents all fees waived in the prior fiscal year. As reported in Part 1, fees waived must agree or be reconcilable with fee waivers reported in the AFR Annual Financial Report and the OCR B3 Financial Assistance to Students in Institutions of Higher Education.

Part 2 - Fee Waiver Policy - This part should provide, in the same sequence as in Part 1, the policies of the college related to the granting of waivers reported in Part 1.

Part 3 - Schedule of Student Fee Charges - This part reports student fee charges in effect at the college as of October 1. These charges are the current academic year for charges.

The following are definitions and instructions to be used to complete the FW-1 report, Parts 1, 2, and 3. Report forms also follow.

## Instructions for Part 1 (Fee Waiver Report)

### Classification of Student Fee Waivers

1. Athletics - Fees waived for actual participation in the college's sports program.

2. Scholastic, Academic Achievement, etc. - Fees waived on the basis of past grades or other criteria of academic success. This category would also include waivers for past achievement in music, art, etc. as opposed to waivers for participation in chorus, band, etc.

3. Financially Disadvantaged - Fees waived for those with low income, from low income families, and otherwise economically deprived.

4. College Employees and Employee Dependents - Fees waived for faculty and staff members, their spouses, and their children.

5. Employees of Other Governmental Agencies - Fees waived for those employed by any public agency such as another college, the public school system, the county, the state, or the federal government.

6. Senior Citizens - Fees waived for students who have attained the age, as defined locally, of a senior citizen or persons who are retired.

7. Student activities - Fees waived on the basis of actual participation in college activities such as band, chorus, student government, school publications, etc. This group is not to be confused with scholastic and academic recipients.

8. Prison Inmates - Fees waived for those being detained in city, county, state, or federal prisons.

9. Other - Those fee waivers which do not clearly fit into any of the above categories. Categories here should be clearly defined or described.

10. Total - All Fee Waivers - The aggregated totals for all fee waiver types.

### Definitions

1. Number of students receiving the waiver(s) during the fiscal year. This is an unduplicated headcount of the number of students receiving a particular type of waiver. If the student received more than one waiver of this type during the fiscal year, he or she would be counted only once. (The student would be counted again if he or she received another type of waiver as well.) Headcount is unduplicated within each type of waiver.

2. Number of fee waivers awarded. This is a count of the total number of fee waivers awarded for each waiver type.

3. Student semester hours for credit courses for which fees were waived. Report student semester hours to the nearest hour.

4. Credit hour equivalents for non-credit courses for which fees were waived. These are computed equivalents of student semester hours for courses in which no credit is awarded (non-credit courses). Student semester hour equivalents are computed by dividing the total number of Instructional Hours by 27. Instructional hours are computed by multiplying the number of students officially registered by the number of hours that the course meets; i.e., the number of hours each student received instruction. Report credit hour equivalents to the nearest hour.

5. Dollar amount of fee waivers for this waiver type. Provide the total dollar amount of fees waived for each waiver type.

## DIVISION OF COMMUNITY COLLEGES

## Student Fees and Fee Waiver Report

Fiscal Year:______________ College:__________________

### Part 1 - Fee Waiver Report

1. Waiver Type: Athletics

a. Number of students receiving the fee waiver(s) during the fiscal year: __________

b. Number of fee waivers awarded: __________

c. Student semester hours for credit courses for which fees were waived: __________

d. Credit hour equivalents for non-credit courses for which fees were waived: __________

e. Dollar amount of fee waivers for this waiver type: $__________

2. Waiver Type: Scholastic, Academic Achievement, etc.

a. Number of students receiving the fee waiver(s) during the fiscal year: __________

b. Number of fee waivers awarded: __________

c. Student semester hours for credit courses for which fees were waived: __________

d. Credit hour equivalents for non-credit courses for which fees were waived: __________

e. Dollar amount of fee waivers for this waiver type: $__________

3. Waiver Type: Financially Disadvantaged

a. Number of students receiving the fee waiver(s) during the fiscal year: __________

b. Number of fee waivers awarded: __________

c. Student semester hours for credit courses for which fees were waived: __________

d. Credit hour equivalents for non-credit courses for which fees were waived: __________

e. Dollar amount of fee waivers for this waiver type: $__________

DIVISION OF COMMUNITY COLLEGES

Student Fees and Fee Waiver Report

Fiscal Year:__________ College:____________________

4. Waiver Type: College Employees and Employee Dependents

   a. Number of students receiving the fee waiver(s) during the fiscal year: ________

   b. Number of fee waivers awarded: ________

   c. Student semester hours for credit courses for which fees were waived: ________

   d. Credit hour equivalents for non-credit courses for which fees were waived: ________

   e. Dollar amount of fee waivers for this waiver type: $________

5. Waiver Type: Employees of Other Governmental Agencies

   a. Number of students receiving the fee waiver(s) during the fiscal year: ________

   b. Number of fee waivers awarded: ________

   c. Student semester hours for credit courses for which fees were waived: ________

   d. Credit hour equivalents for non-credit courses for which fees were waived: ________

   e. Dollar amount of fee waivers for this waiver type: $________

6. Waiver type: Senior Citizens

   a. Number of students receiving the fee waiver(s) during the fiscal year: ________

   b. Number of fee waivers awarded: ________

   c. Student semester hours for credit courses for which fees were waived: ________

   d. Credit hour equivalents for non-credit courses for which fees were waived: ________

   e. Dollar amount of fee waivers for this waiver type: $________

DIVISION OF COMMUNITY COLLEGES

Student Fees and Fee Waiver Report

Fiscal Year:__________ College:____________________

7. Waiver Type: Student Activities

a. Number of students receiving the fee waiver(s) during the fiscal year: __________

b. Number of fee waivers awarded: __________

c. Student semester hours for credit courses for which fees were waived: __________

d. Credit hour equivalents for non-credit courses for which fees were waived: __________

e. Dollar amount of fee waivers for this waiver type: $__________

8. Waiver Type: Prison Inmates

a. Number of students receiving the fee waiver(s) during the fiscal year: __________

b. Number of fee waivers awarded: __________

c. Student semester hours for credit courses for which fees were waived: __________

d. Credit hour equivalents for non-credit courses for which fees were waived: __________

e. Dollar amount of fee waivers for this waiver type: $__________

9. Waiver Type: Other: ______________________________
(Specify)

a. Number of students receiving the fee waiver(s) during the fiscal year: __________

b. Number of fee waivers awarded: __________

c. Student semester hours for credit courses for which fees were waived: __________

d. Credit hour equivalents for non-credit courses for which fees were waived: __________

e. Dollar amount of fee waivers for this waiver type: $__________

DIVISION OF COMMUNITY COLLEGES

Student Fees and Fee Waiver Report

Fiscal Year:________________ College:____________________

NOTE: This page should be duplicated as necessary to provide for all fee waivers.

Waiver Type: Other:______________________________
(Specify)

a. Number of students receiving the fee waiver(s) during the fiscal year: __________

b. Number of fee waivers awarded: __________

c. Student semester hours for credit courses for which fees were waived: __________

d. Credit hour equivalents for non-credit courses for which fees were waived: __________

e. Dollar amount of fee waivers for this waiver type: $__________

Waiver Type: Other:______________________________
(Specify)

a. Number of students receiving the fee waiver(s) during the fiscal year: __________

b. Number of fee waivers awarded: __________

c. Student semester hours for credit courses for which fees were waived: __________

d. Credit hour equivalents for non-credit courses for which fees were waived: __________

e. Dollar amount of fee waivers for this waiver type: $__________

DIVISION OF COMMUNITY COLLEGES

Student Fees and Fee Waiver Report

Fiscal Year:_____________ College:________________________

10. Waiver Type: Total - All Fee Waivers

a. Number of students receiving the fee waiver(s) during the fiscal year: __________

b. Number of fee waivers awarded: __________

c. Student semester hours for credit courses for which fees were waived: __________

d. Credit hour equivalents for non-credit courses for which fees were waived: __________

e. Dollar amount of fee waivers for this waiver type: $__________

Prepared by:____________________________ Date:__________________________

DIVISION OF COMMUNITY COLLEGES

Student Fees and Fee Waiver Report

Fiscal Year:________________ College:_________________________

Part 2 - Fee Waiver Policy

1. Please provide the fee waiver policy of the college relative to each type of waiver. This may be derived from the college catalog or other college publication, from policy and procedure manuals or other internal documents. The sequence should follow that of Part 1; i.e.,

   1. Athletics

      The college policy relative to athletic fee waivers is ...............

   2. Scholastic, Academic Achievement, etc.

      The college policy relative to scholastic/academic achievement fee waivers is ........................

   3. etc.

NOTE: Attach separate pages as needed.

## DIVISION OF COMMUNITY COLLEGES

### Student Fees and Fee Waiver Report

Academic Year:______________ College:___________________________

### Part 3 - Schedule of Student Fee Charges

1. In the space below please report the charge per student credit hour for credit courses for in-state matriculation and out-of-state tuition and matriculation.

| Credit Courses | In-State Matriculation | Out-of-State Tuition and Matriculation |
|---|---|---|
| Advanced and Professional Courses<br>Occupational Courses<br>Compensatory Courses | $______/credit hour | $______/credit hour |

2. In the space below report the average charge per credit hour equivalent for non-credit courses in each instructional subfunction or cluster listed. This should be determined by deriving the average charge per instructional hour (teacher contact hour) and then computing the credit hour equivalent charges. (Refer to examples on next page.) For example, if the average charge per instructional hour for Citizenship courses is $.40 then the credit hour equivalent charge is $10.80 (i.e., 27 x $.40). Twenty-seven (27) instructional hours is equivalent to one semester credit hour for this purpose.

Occupational $____________/credit hour equivalent

Compensatory $____________/credit hour equivalent

Adult Elementary & Secondary $____________/credit hour equivalent

Citizenship $____________/credit hour equivalent

Recreational & Leisure Time $____________/credit hour equivalent

Prepared by:__________________________ Date:_______________________

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
An equal opportunity employer

## Examples for Computing Fees for Credit Hour Equivalents

| | |
|---|---|
| Charge per person for a typical non-credit course: | $ 30.00 |
| Instructor's contact hours teaching this course: | 45 |
| Average charge per instructional hour: | $ 30.00 ÷ 45 = $.667 |
| Report the credit hour equivalent charge: | $ .667 x 27 = $18.00 |

OR

| | |
|---|---|
| Total charges for all non-credit courses: | $ 3200 |
| Total student clock hours for these courses: | 6000 |
| Average charge per student clock hour: | $ 3200 ÷ 6000 = $.533 |
| Report the credit hour equivalent charge: | $ .533 x 27 = $14.39 |

# SECTION 8

## FACILITIES INVENTORY REPORT
## IU-1, 2, 3, 4

### Purpose of Facilities Inventory

The Facilities Inventory provides the data base for all reports involving the physical facilities of a college. From these reports, evaluations and decisions are made which effect the future of the college.

The data are used in many ways: to determine the number of existing student stations and the instructional capacity, for matching with the Space Utilization Report in the identification of the amount of utilization of instructional rooms, to report accommodations for the physically disabled, for site planning, by the educational plant survey, to identify space needs used for the capital outlay budget request, and in the generation of funding needs for facilities depreciation. With all of these applications, it is critical that these data be correct.

Further, Sections 235.41(1) and 235.435(4) of the Florida Statutes require that an updated facilities inventory be maintained for use by the Office of Educational Facilities Construction, Department of Education.

### Overview of Facilities Inventory

The Facilities Inventory contains information about each site, each building on each site and each room in each building that is used by the college. All buildings owned by the college, including those for which a construction contract has been awarded, are included in the inventory. Leased or shared sites, buildings and rooms also are included when the agreement for leasing or sharing is for more than one year.

In addition to maintaining the Facilities Inventory, the college is responsible for submitting a complete file of building schematics and site plans to the Office of Educational Facilities Construction. This file of simple line drawings includes the configuration of rooms for each building (schematics) and the layout of buildings on each site (site plans) contained in the Facilities Inventory. The drawings are to be on letter or legal-size paper and labeled appropriately. They are to be updated whenever changes are made.

### General Description of Report

The Facilities Inventory consists of three files: site file, facility file and room file. Each entry in the files is uniquely identified by its key element. The key element for a site is site number. The key element for a facility consists of site number and facility number. For a room, it is the combination of site number, facility number, room number and room-number suffix. When the files are updated, data are referenced by these unique identifying numbers.

This report provides the means for updating the inventory by adding, changing or deleting entries in the existing files. Typically the inventory is updated by using the Inventory Update (IU) forms included in this section. The IU-1, Site Update, is the form used for updating information in the site file. The IU-2, Facility Update, is for the facility file. The IU-3, Room Update, is for the room file. The IU-4, Number Change, is used for all number changes, whether for the site, facility or room file. The inventory also may be updated by equivalent punched cards or computer tape.

The first update cycle of each year reports the facilities as they are on June 30th. This inventory is used in the preparation of the capital outlay budget request. The second update cycle reports the facilities as they are during a selected week in October. This inventory is matched with the Space Utilization Report for the same week. An additional update is prepared by a college when it has scheduled an educational plant survey. This update is submitted to the Division sixty days prior to the survey. In the event that a college has no updating activity during a regular update cycle, a letter is to be sent to the Division stating this fact.

## General Instructions for Report

### A. Requirements for Types of Transactions

The IU-1, 2 and 3 forms allow for three types of transactions:

1. new entry
2. change of existing entry
3. deletion of existing entry

Every transaction type 1, new entry, requires that data must be entered in every field. Any exceptions to this requirement are specified under the Definitions and Instructions sections below.

A transaction type 2, change of existing entry, requires that the numbers which uniquely identify the space must be entered in the key fields. Then additional data are entered only in the fields which need to be changed. Do not reenter correct data that already exists in the inventory.

Transaction type 3, deletion of existing entry, requires that only the numbers which identify the space must be entered in the key fields. Do not reenter any other data.

### B. Data Entry by Numeric Codes

Numeric codes must be used to enter data on the IU forms. Only numerals are to be used; no dashes, slashes, commas, periods, etc. are allowed. Descriptive words must not be used on these entry forms even though the final printout contains them. The only places where characters other than numerals are allowed on the IU forms are the site, facility and room name fields, the room number prefix and the room number suffix.

## C. Right-Justified Fields

All numeric data fields are right-justified. Do not annex leading zeros to the left-hand side to fill in the fields.

## D. Data Entered on Each Line

Data must be entered in every necessary field on each line of entry of an IU form. Do not use squiggly lines or ditto marks to carry data down the page.

## E. Name Fields

The fields for site name, facility name and room name are fifteen (15) characters wide. If longer names are entered on IU forms they are truncated to fifteen places. The characters that are allowed in the name fields include letters, underlined letters, numerals, blanks, periods, commas, hyphens, slashes and parentheses. Other characters are changed to blanks. Ampersands are not allowed.

## F. Format for Dates

All dates entered in the data fields on the IU forms must be in the format YYMM which stands for the last two digits of the year and two places for the month. (For example, June 1980 is entered as 8007.) The day of the month is not reported. Dashes and slashes are not allowed. When the month is not known, two zeros are used.

At the bottom of each IU form is a space for the date the update is prepared. This is entered with the update data and appears under the "Last Update" column on the printout. The dates dictate the chronological order in which updates are implemented. When the order of implementation is critical, as with number changes, different dates can be used on separate forms as a means of manipulating the sequence. The format for the date of preparation is YYMMDD, two places each for year, month and day. (For example, November 15, 1981 is entered 811115.) Dashes and slashes are not allowed.

## G. Matching of Sites, Buildings and Rooms

When a site is added to the inventory, it may or may not contain any facilities. But when a facility is added it always must be located on a site. Whenever a building is added to the inventory, the rooms for that building also must be added. When a facility other than a building is added, it probably will not have any rooms. Further, no rooms can be added without the addition of the building which contains them. A facility cannot exist without a site. A building cannot exist without rooms and rooms cannot exist without a building.

Likewise, when a site is deleted, the facilities on that site and the rooms in the buildings on that site also must be deleted. When a site remains, but a building is deleted, the rooms in that building also must be deleted.

H. Organization of Report

Each IU form must include the name of the college, the name of the person who prepared the form and the date the form was prepared. All of the update forms for one cycle are to be batched together with the IU-4 forms placed first, followed by the IU-1 forms, then the IU-2 forms and finally the IU-3 forms. The complete batch of forms is to be numbered successively. For ease of reference, the updates should be in numerical order as they appear in inventory, by site number, facility number and room number.

## Definitions and Instructions for Site Update, IU-1

Each data field which appears on the IU-1, Site Update form is described below. Definitions of codes and special instructions are given for each field. Unless otherwise specified, fields are one place wide and codes are numeric only.

Data Fields

1. File Number - Required for all transactions.

The inventory file to which the entry applies. Preprinted on IU.

| Code | Definition |
|---|---|
| 1 | Site file |

2. Transaction Type - Required for all transactions.

The type of transaction which applies to the entry.

| Code | Definition |
|---|---|
| 1 | New entry |
| 2 | Change of existing entry |
| 3 | Deletion of existing entry |

3. Site Number - Required for all transactions.

Two-place field. Unique number among all site numbers for the college. Key element for identifying a site within the file.

4. Site Name - Required for transaction type 1.

Fifteen-place field. Alpha/numeric (see Item E, Name Fields under General Instructions for Report, above).

5. Site Type - Required for transaction type 1.

Designation of the nature of the site.

| Code | Definition |
|---|---|
| 1 | Campus |
| 2 | Additional campus |
| 3 | Instructional center |
| 4 | Special purpose center |
| 5 | Administrative center |
| 6 | Undeveloped site |
| 0 | Other |

6. Site Area in Acres - Required for transaction type 1.

Six-place field. Area of site in acres. May contain two decimal places.

7. Site Ownership - Required for transaction type 1.

The agency with which the title to the site rests.

| Code | Definition |
|---|---|
| 1 | Owned in fee simple. |
| 2 | Title vested in the institution and being paid for on an amortization schedule (regardless of whether site is shared with another institution or organization). |
| 3 | Title vested in a holding company or land corporation to which payments are being made by the institution; title utlimately will pass to the institution (includes lease-purchase arrangements). |
| 4 | Not owned by the institution, but leased or rented to the institution at a typical local rate. |
| 5 | Not owned by the institution, but made available to the institution either at no cost or at a nominal rate. |
| 6 | Not owned by the institution, but shared with an educational organization that is not a postsecondary institution. |
| 7 | Not owned by the institution, but shared with another postsecondary educational institution. |
| 8 | Other (e.g., not owned by the institution, but shared with a noneducational institution). |

8. Site Length of Holding - Required for transaction type 1.

Two-place field. Number of years for which a site is leased or shared. Use zero for more than 99 years. Use zero for owned site.

9. Site Acquisition Means - Required for transaction type 1.

The means by which the site was acquired.

| Code | Definition |
|---|---|
| 1 | Purchase |
| 2 | Gift |
| 3 | Gift and purchase |
| 4 | Transfer from Board of Public Instruction |
| 5 | Lease or rental agreement |
| 6 | Other |

10. Site Acquisition Cost - Required for transaction type 1 unless site is unowned (site ownership codes 4, 5, 6, 7, 8).

Eight-place field. The cost of acquiring the site. Round off to the nearest dollar. Do not use dollar signs or commas.

11. Site Acquisition Date - Required for transaction type 1.

Four-place field. YYMM form (two places each for year and month). The year and month in which the site was acquired. Do not enter dashes or slashes.

12. Site Book Value in Dollars - Required for transaction type 1 unless site is unowned (site ownership codes 4, 5, 6, 7, 8).

Eight-place field. The value of the site in dollars as carried by the college in its financial records. Round off to the nearest dollar. Do not enter dollar signs or commas.

13. Site Book Value Date - Required for transaction type 1 unless site is unowned (site ownership codes 4, 5, 6, 7, 8).

Four-place field. YYMM form (two places each for year and month). The year and month in which the site book value in dollars was determined. Do not enter dashes or slashes.

## Definitions and Instructions for Facility Update, IU-2

Each data field which appears on the IU-2, Facility Update form is described below. Definitions of codes and special instructions are given for each field. Unless otherwise specified, fields are one place wide and codes are numeric only.

Data Fields

1. File Number - Required for all transactions.

   The inventory file to which the entry applies. Preprinted on IU.

   | Code | Definition |
   |---|---|
   | 2 | Facility file |

2. Transaction Type - Required for all transactions.

   (See Item 2, Transaction Type under Site Update, above.)

3. Site Number - Required for all transactions.

   (See Item 3, Site Number under Site Update, above.)

4. Facility Number - Required for all transactions.

   Four-place field. Unique number among all facility numbers for the site. Part of key element for identifying a facility within the file.

5. Facility Name - Required for transaction type 1.

   Fifteen-place field. Alpha/numeric (see Item E, Name Fields under General Instructions for Report, above).

6. Facility Type - Required for transaction type 1.

   Designation of the nature of the facility.

   | Code | Definition |
   |---|---|
   | 1 | Building |
   | 2 | Parking area |
   | 3 | Athletic area |
   | 4 | Agricultural field |
   | 5 | Outdoor swimming pool |
   | 0 | Other |

7. Facility Status - Required for transaction type 1.

Classification of the life of the facility.

| Code | Definition |
|---|---|
| 1 | Permanent |
| 2 | Temporary |
| 3 | Under construction |

A facility must be entered into the inventory during the first update cycle following the award of the construction contract. If a contract is awarded on June 30th, the facility must be added during the June 30th update cycle. Facility status code 3 is used until the final inspection at which time the code is changed to either 1 or 2.

8. Facility Condition - Required for transaction type 1.

The physical quality of the facility.

| Code | Definition |
|---|---|
| 1 | Satisfactory: Suitable for continued used with normal maintenance. |
| 2 | Remodeling-A: Requires restoration to present acceptable standards without major room-use changes, alterations or moderinzations. The approximate cost of Remodeling-A is up to 25 percent of the estimated replacement cost of the facility. |
| 3 | Remodeling-B: Requires major updating and/or modernization of the facility. The approximate cost of Remodeling-B is between 25 and 50 percent of the estimated replacement cost of the facility. |
| 4 | Remodeling-C: Requires major remodeling of the facility. The approximate cost of Remodeling-C is more than 50 percent of the estimated replacement cost of the facility. |

| Code | Definition |
|---|---|
| 5 | Demolition: Should be demolished or abandoned because the facility is unsafe or structurally unsound, irrespective of the need for space or the availability of funds for replacement. |
| 6 | Termination: Planned termination or relinquishment of occupancy of the facility for reasons other than unsafeness or structural unsoundness, such as abandoment of temporary units or vacating of leased space. |

An unsatisfactory facility condition code, code 5, demolition or code 6, termination, can be entered for a facility only at the recommendation of an educational plant survey in the written survey report or with the written concurrence of the Survey Section of the Office of Educational Facilities Construction.

9. Facility Area in Gross Square Feet - Required for transaction type 1 unless the facility is not a building (facility type codes 2, 3, 4, 5, 0).

Six-place field. The sum of the floor areas of the building included within the outside faces of exterior walls for all stories or for areas that have floor surfaces. Gross area is computed by measuring from the outside face of exterior walls, disregarding cornices, pilasters, buttresses, etc., which extend beyond the wall face. Round to nearest square foot.

10. Facility Ownership - Required for transaction type 1.

The agency with which the title to the facility rests.

| Code | Definition |
|---|---|
| 1 | Owned in fee simple. |
| 2 | Title vested in the institution and being paid for on an amortization schedule (regardless of whether the facility is shared with another institution or organization). |

| Code | Definition |
|---|---|
| 3 | Title vested in holding company or building corporation to which payments are being made by the institution; title will ultimately pass to the institution (includes lease-purchase arrangements). |
| 4 | Not owned by the institution, but leased or rented to the institution at a typical local rate. |
| 5 | Not owned by the institution, but made available to the institution either at no cost or at a nominal rate. |
| 6 | Not owned by the institution, but shared with an educational organization that is not a postsecondary institution. |
| 7 | Not owned by the institution, but shared with another postsecondary educational institution. |
| 8 | Other (e.g., not owned by the institution, but shared with a non-educational institution). |

11. Facility Length of Holding - Required for transaction type 1.

    Two-place field. Number of years for which the facility is leased or shared. Use zero for more than 99 years. Use zero for owned facility.

12. Facility Inspection Date - Required for transaction type 1. (For exceptions, see note following Item 16, below.) Required when facility status code 3 is changed to code 1 or 2.

    Four-place field. YYMM form (two places each for year and month). The year and month in which the Certificates of Final Inspection was issued for facility constructed for the college. The year and month in which construction was completed for purchased facility. Do not enter dashes or slashes.

13. Facility Occupancy Date - Required for transaction type 1 unless the facility is not a building (facility type codes 2, 3, 4, 5, 0) or unless the facility is under construction (facility status code 3). Required when facility status code 3 is changed to code 1 or 2.

    Four-place field. YYMM form (two places each for year and month). The year and month in which the facility was initially occupied by the college. Do not enter dashes or slashes.

14. Facility Construction Cost - Required for transaction type 1. (For exception, see note following Item 16, below.) Required when facility status code 3 is changed to code 1 or 2.

    Eight-place field. The final construction cost or the total purchase price of the facility. Round off to nearest dollar. Do not enter dollar signs or commas.

15. Facility Estimated Replacement Cost - Required for transaction type 1. (For exceptions, see note following Item 16, below.) Required when facility status code 3 is changed to code 1 or 2.

Eight-place field. The estimated cost to replace the facility, including the fixed equipment, with a structure having the same types and amounts of space, at current construction costs. Round off to the nearest dollar. Do not enter dollar signs or commas.

16. Facility Estimated Replacement Cost Date - Required for transaction type 1. (For exceptions, see note below.) Required when facility status code 3 is changed to code 1 or 2.

Four-place field. YYMM form (two places each for year and month). The year and month in which the facility estimated replacement cost was determined. Do not enter dashes or slashes.

NOTE: Items 12, 14, 15 and 16 are required for transaction type 1 unless the facility is not a building (facility type codes 2, 3, 4, 5, 0) or unless the facility is under construction (facility ownership codes 4, 5, 6, 7, 8).

## Definitions and Instructions for Room Update, IU-3

Each data field which appears on the IU-3, Room Update form is described below. Definitions of codes and special instructions are given for each field. Unless otherwise specified, fields are one place wide and codes are numeric only.

Data Fields

1. File Number - Required for all transactions.

The inventory file to which the entry applies Preprinted on IU.

| Code | Definition |
|---|---|
| 3 | Room file |

2. Transaction Type - Required for all transactions. (See Item 2, Transaction Type under Site Update, above.)

3. Site Number - Required for all transactions. (See Item 3, Site Number under Site Update, above.)

4. Facility Number - Required for all transactions. (See Item 4, Facility Number under Facility Update, above.)

5. Room Number - Required for all transactions.

   Four-place field. First place is alpha/numeric; last three places are numeric only. When alpha prefix is used, all four places must be filled. When only numeric is used, field is right-justified and leading zeros are not used.

   The combination of room number and room-number suffix (see Item 6, below) must be unique among all room number and room-number suffix combinations for the facility. Part of key element for identifying a room within the file.

6. Room-Number Suffix - Optional for transaction type 1; required for transaction types 2 and 3 if suffix already exists.

   Alpha/numeric. Unique letter or number among all suffixes for the room number. If suffix exists, part of key element for identifying a room within the file. If no suffix exists, leave blank since a zero entry could be read as the letter "O".

7. Room Name - Required for transaction type 1.

   Fifteen-place field. Alpha/numeric (see Item E, Name Fields under General Instructions for Report, above). Name assigned to room by college, except classroom for laboratory-related instruction always is named RELATED INSTRCT. May describe use of room.

8. Room-Use Code - Required for transaction type 1.

   Three-place field. Description of the use for which the room is designed. For detailed definitions refer to the Higher Education Facilities Inventory and Classification Manual, 1973 published by the United States Office of Education.

| Group | Code | Definition |
|---|---|---|
| Classroom: | 110 | Classroom |
| | 115 | Classroom Service |
| Laboratory: | 210 | Class Laboratory |
| | 212 | Related-Instruction Classroom |
| | 215 | Class-Laboratory Service |
| | 220 | Special-Class Laboratory |
| | 225 | Special-Class-Laboratory Service |
| | 230 | Individual-Study Laboratory |
| | 235 | Individual-Study-Laboratory Service |
| | 250 | Nonclass Laboratory |
| | 255 | Nonclass-Laboratory Service |
| Office: | 310 | Office |
| | 315 | Office Service |
| | 350 | Conference Room (Office-Related) |
| | 355 | Conference-Room Service (Office-Related) |
| Study: | 410 | Reading/Study Room |
| | 420 | Stack |
| | 430 | Open-Stack Reading Room |
| | 440 | Processing Room |
| | 455 | Study Service |
| Special-Use: | 510 | Armory |
| | 515 | Armory Service |
| | 520 | Athletic/Physical Education |
| | 523 | Athletic Facilities Spectator Seating |
| | 525 | Athletic/Physical-Education Service |
| | 530 | Audiovisual, Radio, TV |
| | 535 | Audiovisual, Radio, TV Service |
| | 540 | Clinic (Nonhealth Professions) |
| | 545 | Clinic Service (Nonhealth Professions) |
| | 550 | Demonstration |
| | 555 | Demonstration Service |
| | 560 | Field Building |
| | 570 | Animal Quarters |
| | 575 | Animal-Quarters Service |
| | 580 | Greenhouse |
| | 585 | Greenhouse Service |
| | 590 | Other |
| General Use: | 610 | Assembly |
| | 615 | Assembly Service |
| | 620 | Exhibition |
| | 625 | Exhibition Service |
| | 630 | Food Facilities |
| | 635 | Food-Facilities Service |
| | 650 | Lounge |
| | 655 | Lounge Service |
| | 660 | Merchandising Facilities |
| | 665 | Merchandising-Facilities Service |
| | 670 | Recreation |
| | 675 | Recreation Service |
| | 680 | Meeting Room |

| Group(Cont.) | Code(Cont.) | Definition(Cont.) |
|---|---|---|
| General Use (Cont.) | 685 | Meeting-Room Service |
| | 690 | Locker Room |
| Supporting: | 710 | Data Processing/Computer |
| | 715 | Data Processing/Computer Service |
| | 720 | Shop |
| | 725 | Shop Service |
| | 730 | Storage |
| | 735 | Storage Service |
| | 740 | Vehicle-Storage Facility |
| | 745 | Vehicle-Storage-Facility Service |
| | 750 | Central Food Stores |
| | 760 | Central Laundry |
| Health-Care: | 810 | Patient Bedroom |
| | 820 | Patient Bath |
| | 830 | Nurse Station |
| | 840 | Surgery |
| | 850 | Treatment |
| | 860 | Service Laboratory |
| | 870 | Supplies |
| | 880 | Public Waiting |
| | 895 | Health-Care Service |
| Residential: | 910 | Sleep/Study without Toilet/Bath |
| | 919 | Toilet/Bath |
| | 920 | Sleep/Study with Toilet/Bath |
| | 935 | Sleep/Study Service |
| | 950 | Apartment |
| | 955 | Apartment Service |
| | 970 | House |
| Non-assignable: | 010 | Custodial Area |
| | 020 | Circulation Area |
| | 030 | Mechanical Area and Toilet Room |
| | 040 | Structural Area |

At the time that a facility whose status is under construction is entered into the inventory (see Item 7, Facility Status under Definitions and Instructions for Facility Update, IU-2, above), the rooms for that building must be entered into the inventory. Individual rooms may be entered based on information taken from the construction drawings. Or, pseudo rooms may be used to enter aggregates of the area and the student stations for the appropriate room-use code. When the building is completed, the room file is updated to report the rooms as built.

9. Room Area in Net Square Feet - Required for transaction type 1.

   Six-place field. The floor area of the room computed by measuring from the inside surfaces of the walls, excluding unusable areas having less than six feet, six inches clear headroom. Round to nearest square foot.

For some reports, room areas are grouped into space categories. The combination of the room-use code and the information classification structure code for a room determines into which category the area is placed. The ten assignable space categories are: classroom, academic laboratory, occupational laboratory, physical education, library, audiovisual, auditorium/exhibition, student services, offices and support services.

10. Room Information Classification Structure (ICS) Code - Required for transaction type 1.

Eight-place field. The Florida Community College Information Classification Structure code that identifies the program or function to which the activities in the room contribute. The codes and definitions are found in "Section 2" and "Appendix A" of the *Community College Management Information System Procedures Manual*.

The ICS code for a classroom for laboratory-related instruction (room-use code 212) is always the same as for the laboratory to which it is related. All eight places in field must be filled. Use numerals only. Do not separate numerals with dashes or decimal points.

11. Room Actual Student Stations - Required for transaction type 1.

Five-place field. The actual number of student stations in the room. A student station is a regular place in an instructional room which is outfitted properly with a seat and/or any necessary equipment where one student can work. Use actual number for instructional rooms: room-use codes 110, 210, 220, 230 and 520. Zero is appropriate for all other rooms.

12. Room Suitability - Required for transaction type 1.

A rating of the appropriateness of the room for the activities assigned to it.

| Code | Definition |
|---|---|
| 1 | Suitable |
| 2 | Marginally suitable |
| 3 | Unsuitable |

13. Room Wheelchair Accessibility - Required for transaction type 1.

The identification of whether or not the room is accessible by a person in a wheelchair. A room is accessible when the clear opening width of the door is a minimum of 32 inches and when the floor of the building on which it is located is accessible either by groud-level, ramp or elevator.

| Code | Definition |
|---|---|
| 1 | Accessible |
| 0 | Not accessible |

14. Room Organizational Unit - Always optional.

Five-place field. Identification of the department or division to which the room is assigned. Codes are defined by college.

## Definitions and Instructions for Number Change, IU-4

The function of the number change transaction is to change the value of any key element to a different value. That is, it changes a number which uniquely identifies either a site, a facility or a room to another unique number. The IU-4 is used to enter number changes for all three files: site, facility and room.

The data fields which appear on the IU-4, Number Change form are described below. Instructions are given for entering numbers. Then general procedures related to changing numbers are discussed.

### Data Fields

1. Record Type - Required for all transactions.

The type of transaction which applies to the entry. Preprinted on IU.

| Code | Definition |
|---|---|
| 4 | Number change |

2. File Number - Required for all transactions.

The inventory file to which the number change applies.

| Code | Definition |
|---|---|
| 1 | Site file |
| 2 | Facility file |
| 3 | Room file |

3. Existing Key Element - Required for all transactions.

   The complete number that currently uniquely identifies the site, the facility or the room for which the number is to be changed. When a site number is to be changed, enter only the existing site number. When a facility number is to be changed, enter both the existing site number and facility number. When a room number is to be changed, enter the combination of its existing site number, facility number and room number. When a room-number suffix is to be changed, enter the combination of its existing site number, facility number, room number and room-number suffix.

4. New Key Element - Required for all transactions.

   Either the partial number or the complete number that is required to change an existing key element to another desired key element. Enter only the changed part of a new number. Do not reenter an already existing (unchanged) part of a new number. For example, when a facility number is to be changed but its site number stays the same, enter only the new facility number. But when both the site number and the facility number are to be changed, enter both the site number and the new facility number. If a room number is to be changed, but its site number and facility number stay the same, enter only the new room number.

## General Procedures Related to Changing Numbers

1. Changes Applied to One or All Entries in File

   One number change can be applied to a single entry in a file or to all entries within a file. Two factors relate to whether a change applies to one or to all entries: (1) the file number indicated on the line of entry on the IU-4 and (2) the level of detail indicated in the existing key element. Specific requirements for transactions are explained under Types of Number Change Transactions in "Appendix D, Facilities Inventory Update Examples".

## 2. Maintaining Uniqueness of Key Elements

Two principles that effect number changes are: (1) key elements are unique and (2) dates of entry determine the sequence of transactions. Key elements must be unique and cannot be duplicated at any one point in time. That is, every single site, facility and room within the inventory files must be individually identifiable by its own complete number. However, number change transactions within the same file can be done simultaneously. That is, numbers within the same file can be switched around (for example, sites 1, 2 and 3 can become sites 3, 1 and 2 respectively) provided all of the number changes are entered on the same day.

The date of entry is the day indicated on the line for date prepared at the bottom of an IU form. When numbers are switched on the same day, key elements are not duplicated. Of course, if one number is changed to a second number, the second number also must be changed to another number. If the second number is not changed, then its site, facility or room must have been deleted beforehand on an IU form indicating an earlier date.

## 3. Complex Updating Situations

Dates of entry can be manipulated to assure the proper sequencing of update transactions. (Date of entry is defined in the paragraph above.) This is especially significant when a complex series of operations is required to update the inventory. Key elements may need to be changed in two or three files and data may need to be added, changed and/or deleted within one or more files.

The following chronological order of entry will accomplish complex updating. Enter the transactions for each "day" using different dates on separate forms. Use only the steps required to achieve the results desired.

### First Day

Step 1: Change existing site numbers to new site numbers in the site file, facility file and room file, using the IU-4.

Step 2: Change existing facility numbers to new facility numbers in the facility file and room file, using the IU-4.

### Second Day

Step 3: Change existing room numbers (a new site number and a new facility number from the first day now are part of the existing key element for a room) within a facility to new room numbers in the room file, using the IU-4.

Changes cannot be made simultaneously to both a facility number and a room number within the room file. This has to be accomplished by two transactions: Step 2 and Step 3. Or, a complete existing room number can be deleted and a complete new room number can be added by using the IU-3.

Second Day or Third Day

Step 4: Update data in the site file, using the IU-1, and in the facility file, using the IU-2. (New site numbers and new facility numbers from the first day now are existing numbers.)

Third Day

Step 5: Update data in the room file, using the IU-3. (New room numbers from the second day now are existing room numbers.)

4. Additional Comments about Number Changing

Any update which applies to a space for which the number has been changed must refer to the new key element, which has become the existing key element.

When a site number no longer exists, then no facility numbers or room numbers can exist for that site. Likewise, when a facility number no longer exists, then no room numbers can exist for that facility.

The number change transaction is efficient when used properly. If the mechanics of using it are not understood, number changes also can be accomplished by a series of deletions and additions, using the IU-1, 2, or 3. A deletion is transacted for every space for which a number is to be changed. Then an addition is transacted for every space which is to have a new number by reentering the complete line of existing data but using the new number.

NOTE: For examples of number change transactions, please refer to "Appendix D, Facilities Inventory Update Examples."

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## DIVISION OF COMMUNITY COLLEGES
## FACILITIES INVENTORY

### SITE UPDATE

College: ________________________________________

8.20

| File Number | Transaction Type* | Site Number ** | Name | Type | Area in Acres | Owner-ship | Length of Holding | Acquisition | | | Book Value | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | Means | Cost | Date | In Dollars | Date |
| 1 | | | | | | | | | | | | |
| 1 | | | | | | | | | | | | |
| 1 | | | | | | | | | | | | |
| 1 | | | | | | | | | | | | |
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| 1 | | | | | | | | | | | | |
| 1 | | | | | | | | | | | | |

IU - 1
5/80

*Transaction Type: 1 - New Entry, 2 - Change of existing entry,
3 - Deletion of existing entry

**Key Field - Must be Coded.

Prepared by: ________________________________ Date Prepared: ________________

## Coding Summary for IU-1, Site Update

| | |
|---|---|
| Site Number: | Assigned by college. Key element. |
| Name: | Assigned by college. Fifteen places. |
| Type: | 1 - Campus<br>2 - Additional campus<br>3 - Instructional center<br>4 - Special purpose center<br>5 - Administrative center<br>6 - Undeveloped site<br>0 - Other |
| Area in Acres: | Area in acres. May contain two decimal places. |
| Ownership: | 1 - Owned in fee simple<br>2 - Institution amortizing<br>3 - Institution paying holding company<br>4 - Unowned, leased or rented<br>5 - Unowned, nominal rate<br>6 - Unowned, shared with nonpostsecondary<br>7 - Unowned, shared with postsecondary<br>8 - Other |
| Length of Holding: | Number of years of lease or sharing. Zero for owned. |
| Acquisition Means: | 1 - Purchase<br>2 - Gift<br>3 - Gift and purchase<br>4 - Transfer from Board of Public Instruction<br>5 - Lease or rental agreement<br>6 - Other |
| Acquisition Cost: | Cost of acquiring site. Round to nearest dollar. |
| Acquisition Date: | Year and month site acquired. YYMM form. |
| Book Value in Dollars: | Value of site carried in financial records. Round to nearest dollar. |
| Book Value Date: | Year and month site book value determined. YYMM form. |
| Date Prepared: | Year, month and day IU-1 prepared. YYMMDD form. |

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*Tallahassee, Florida*
*Ralph D. Turlington, Commissioner*
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## DIVISION OF COMMUNITY COLLEGES
## FACILITIES INVENTORY

## FACILITY UPDATE

College: ______________________________

8.22

| File Number | Transaction Type* | Site Number ** | Facility Number ** | Name | Type | Status | Condition | Area in Gross Square Feet | Ownership | Length of Holding | Inspection Date | Occupancy Date | Construction Cost | Estimated Replacement | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | | | | | Cost | Date |
| 2 | | | | | | | | | | | | | | | |
| 2 | | | | | | | | | | | | | | | |
| 2 | | | | | | | | | | | | | | | |
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IU - 2
5/80

* Transaction Type: 1 - New entry, 2 - Change of existing entry,
3 - Deletion of existing entry

**Key Field - Must be Coded.

Prepared By: ______________________________ Date Prepared: ______________________

## Coding Summary for IU-2, Facility Update

| | |
|---|---|
| Site Number: | Assigned by college. Key element. |
| Facility Number: | Assigned by college. Key element. |
| Name: | Assigned by college. Fifteen spaces. |
| Type: | 1 - Building<br>2 - Parking area<br>3 - Athletic area<br>4 - Agricultural field<br>5 - Outdoor swimming pool<br>0 - Other |
| Status: | 1 - Permanent<br>2 - Temporary<br>3 - Under construction |
| Condition: | 1 - Satisfactory<br>2 - Remodeling-A<br>3 - Remodeling-B<br>4 - Remodeling-C<br>5 - Demolition<br>6 - Termination |
| Area in Gross Square Feet: | Area in gross square feet. Round to nearest square foot. |
| Ownership: | 1 - Owned in fee simple<br>2 - Institution amortizing<br>3 - Institution paying holding company<br>4 - Unowned, leased or rented<br>5 - Unowned, nominal rate<br>6 - Unowned, shared with nonpostsecondary<br>7 - Unowned, shared with postsecondary<br>8 - Other |
| Length of Holding: | Number of years of lease or sharing. Zero for owned. |
| Inspection Date: | Year and month Certificate of Final Inspection issued for facility constructed for college or construction completed for purchased facility. YYMM form. |
| Occupancy Date: | Year and month facility occupied by college. YYMM form. |
| Construction Cost: | Cost of construction or purchase of facility. Round to nearest dollar. |
| Estimate Replacement Cost: | Current cost to replace facility. Round to nearest dollar. |
| Est. Replacement Cost Date: | Year and month facility replacement cost estimated. YYMM form. |
| Date Prepared: | Year, month and day IU-2 prepared. YYMMDD form. |

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*Department of Education*
*Tallahassee, Florida*
*Ralph D. Turlington, Commissioner*
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## DIVISION OF COMMUNITY COLLEGES
## FACILITIES INVENTORY

## ROOM UPDATE

College: ______________________________

| File Number | Transaction Type* | Site Number ** | Facility Number ** | Room** | | Name | Use Code | Area in Net Square Feet | Information Classification Structure Code | Actual Student Stations | Suitability | Wheelchair Accessibility | Organizational Unit |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | Number | Suffix | | | | | | | | |
| 3 | | | | | | | | | | | | | |
| 3 | | | | | | | | | | | | | |
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| 3 | | | | | | | | | | | | | |

8.24

IU - 3
5/80

* Transaction Type: 1 - New entry, 2 - Change of existing entry,
3 - Deletion of existing entry

**Key Field - Must be Coded

Prepared By: ______________________ Date Prepared: ______________

## Coding Summary for IU-3, Room Update

| | |
|---|---|
| Site Number: | Assigned by college. Key element. |
| Facility Number: | Assigned by college. Key element. |
| Room Number: | Assigned by college. Key Element. |
| Room Number Suffix: | Assigned by college. Optional. Key element if suffix exists. |
| Name: | Assigned by college. Fifteen places. |
| Use Code: | Code for use for which room designed. Codes listed in Item 8, Room-Use Code, under Definitions and Instructions for Room Update, IU-3. |
| Area in Net Square Feet: | Area in net square feet. Round to nearest square foot. |
| Information Classification Structure Code: | Code to indentify program or function to which activities in room contribute. Codes found in "Section 2" and "Appendix A" of Community College Management Information System Procedures Manual. |
| Actual Student Stations: | Number of student stations in room. Zero for non-instructional rooms. |
| Suitability: | 1 - Suitable<br>2 - Marginally suitable<br>3 - Unsuitable |
| Wheelchair Accessibility: | 1 - Accessible<br>0 - Not accessible |
| Organizational Unit: | Code for department or division to which room assigned. Optional. |
| Date Prepared: | Year, month and day IU-3 prepared. YYMMDD form. |

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## DIVISION OF COMMUNITY COLLEGES FACILITIES INVENTORY

## NUMBER CHANGE

College: ____________________

| Record Type | File Number* | EXISTING KEY ELEMENT | | | | NEW KEY ELEMENT | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | Site Number | Facility Number | Room | | Site Number | Facility Number | Room | |
| | | | | Number | Suffix | | | Number | Suffix |
| 4 | | | | | | | | | |
| 4 | | | | | | | | | |
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IU - 4
5/80

Prepared By: ____________________

Date Prepared: ____________________

*Site File = 1 Facility File = 2 Room File = 3

## Coding Summary for IU-4, Number Change

| | |
|---|---|
| Existing Key Element: | Complete number that currently identifies site, facility or room for which number is to be changed. |
| New Key Element: | Partial number or complete number required to change existing key element to another desired key element. |

Card Format for Site Update

| Item Number | Card Column(s) | Field Width | Field Type | Field Name |
|---|---|---|---|---|
| 1 | 1-6 | 6 | N | College Number - FICE number |
| 2 | 7-12 | 6 | N | Date of Update - YYMMDD |
| 3 | 13 | 1 | N | File Number - 1 for site |
| 4 | 14 | 1 | N | Transaction Type(1)(2) |
| 5 | 15-16 | 2 | N | Site Number |
| 6 | 17-31 | 15 | A/N | Name(3) |
| 7 | 32-36 | 5 |  | (Blank) |
| 8 | 37 | 1 | N | Type |
| 9 | 38-39 | 2 |  | (Blank) |
| 10 | 40-45 | 6 | N | Area in Acres |
| 11 | 46 | 1 | N | Ownership |
| 12 | 47-48 | 2 | N | Length of Holding |
| 13 | 49-51 | 3 |  | (Blank) |
| 14 | 52-55 | 4 |  | (Blank) |
| 15 | 56 | 1 | N | Acquisition Means |
| 16 | 57-64 | 8 | N | Acquisition Cost |
| 17 | 65-68 | 4 | N | Acquisition Date - YYMM |
| 18 | 69-76 | 8 | N | Book Value in Dollars |
| 19 | 77-80 | 4 | N | Book Value Date - YYMM |

NOTES: (1) Transaction types: 1 - new entry
2 - change of existing entry
3 - deletion of existing entry
4 - file dump from Division to college

(2) If transaction type is 1, each field must have an entry. Exceptions are when item 11 is coded 4, 5, 6, 7 or 8, blanks are allowed for items 16, 18 and 19.

(3) Must be left-justified. All other fields may be right or left-justified, zero or blank-filled.

## Card Format for Facility Update

| Item Number | Card Column(s) | Field Width | File Type | Field Name |
|---|---|---|---|---|
| 1 | 1-6 | 6 | N | College Number - FICE number |
| 2 | 7-12 | 6 | N | Date of Update - YYMMDD |
| 3 | 13 | 1 | N | File Number - 2 for facility |
| 4 | 14 | 1 | N | Transaction Type(1)(2) |
| 5 | 15-16 | 2 | N | Site Number |
| 6 | 17-20 | 4 | N | Facility Number |
| 7 | 21-35 | 15 | A/N | Name(3) |
| 8 | 36-40 | 5 | | (Blank) |
| 9 | 41 | 1 | N | Type |
| 10 | 42 | 1 | N | Status |
| 11 | 43 | 1 | N | Condition |
| 12 | 44-49 | 6 | N | Area in Gross Square Feet |
| 13 | 50 | 1 | N | Ownership |
| 14 | 51-52 | 2 | N | Length of Holding |
| 15 | 53-56 | 4 | N | Inspection Date - YYMM |
| 16 | 57-60 | 4 | N | Occupancy Date - YYMM |
| 17 | 61-68 | 8 | N | Construction Cost |
| 18 | 69-76 | 8 | N | Estimated Replacement Cost |
| 19 | 77-80 | 4 | N | Estimated Replacement Cost Date - YYMM |

NOTES: (1) Transaction types:
- 1 - new entry
- 2 - change of existing entry
- 3 - deletion of existing entry
- 4 - file dump from Division to college

(2) If transaction type is 1, each field must have an entry. Exceptions are when item 10 is coded 3, blanks are allowed for items 15, 16, 17, 18 and 19; when item 13 is coded 4, 5, 6, 7, or 8, blanks are allowed for items 15, 17, 18 and 19; when item 9 is coded 2, 3, 4, 5 or 0, blanks are allowed for items 12, 15, 16, 17, 18 and 19.

(3) Must be left-justified. All other fields may be right or left-justified, zero or blank-filled.

## Card Format for Facility Update

| Item Number | Card Column(s) | Field Width | File Type | Field Name |
|---|---|---|---|---|
| 1 | 1-6 | 6 | N | College Number - FICE number |
| 2 | 7-12 | 6 | N | Date of Update - YYMMDD |
| 3 | 13 | 1 | N | File Number - 2 for facility |
| 4 | 14 | 1 | N | Transaction Type(1)(2) |
| 5 | 15-16 | 2 | N | Site Number |
| 6 | 17-20 | 4 | N | Facility Number |
| 7 | 21-35 | 15 | A/N | Name(3) |
| 8 | 36-40 | 5 | | (Blank) |
| 9 | 41 | 1 | N | Type |
| 10 | 42 | 1 | N | Status |
| 11 | 43 | 1 | N | Condition |
| 12 | 44-49 | 6 | N | Area in Gross Square Feet |
| 13 | 50 | 1 | N | Ownership |
| 14 | 51-52 | 2 | N | Length of Holding |
| 15 | 53-56 | 4 | N | Inspection Date - YYMM |
| 16 | 57-60 | 4 | N | Occupancy Date - YYMM |
| 17 | 61-68 | 8 | N | Construction Cost |
| 18 | 69-76 | 8 | N | Estimated Replacement Cost |
| 19 | 77-80 | 4 | N | Estimated Replacement Cost Date - YYMM |

NOTES: (1) Transaction types: 1 - new entry
2 - change of existing entry
3 - deletion of existing entry
4 - file dump from Division to college

(2) If transaction type is 1, each field must have an entry. Exceptions are when item 10 is coded 3, blanks are allowed for items 15, 16, 17, 18 and 19; when item 13 is coded 4, 5, 6, 7, or 8, blanks are allowed for items 15, 17, 18 and 19; when item 9 is coded 2, 3, 4, 5 or 0, blanks are allowed for items 12, 15, 16, 17, 18 and 19.

(3) Must be left-justified. All other fields may be right or left-justified, zero or blank-filled.

Card Format for Number Change

| Item Number | Card Column(s) | Field Width | Field Type | Field Name |
|---|---|---|---|---|
| 1 | 1-6 | 6 | N | College Number - FICE number |
| 2 | 7-12 | 6 | N | Date of Update - YYMMDD |
| 3 | 13 | 1 | N | Record Type - 4 for number change(1) |
| 4 | 14 | 1 | N | File Number(2) |
| 5 | 15-16 | 2 | N | Existing Site Number |
| 6 | 17-20 | 4 | N | Existing Facility Number |
| 7 | 21-24 | 4 | A/N | Existing Room Number(3) |
| 8 | 25 | 1 | A/N | Existing Room Number Suffix |
| 9 | 26-27 | 2 | N | New Site Number |
| 10 | 28-31 | 4 | N | New Facility Number |
| 11 | 32-35 | 4 | A/N | New Room Number(3) |
| 12 | 36 | 1 | A/N | New Room Number Suffix |

NOTES: (1) All fields may be right or left-justified, zero or blank-filled.

(2) File numbers: 1 - site file
2 - facility file
3 - room file

(3) Columns 21 and 32 are A/N, columns 22-24 and 33-35 are numeric; right justify.

# SECTION 9

## SPACE UTILIZATION REPORT
## SU-1

### Purpose of the Report

The data furnished by this report is matched with the Facilities Inventory to identify the utilization of instructional spaces. For each room designed for regularly scheduled instruction, a percentage of room utilization and of student station utilization, based upon statewide standards, is determined. In addition to room-by-room reporting for owned facilities, instructional activities in unowned facilities are reported in aggregate form.

The information in this report provides for the analysis of the current usage of facilities. Locally it can be applied to the scheduling operation and to the study of educational programs. It also is used in the planning process during the assessment of space needs and the documentation of facilities lists. It is used by the educational plant survey as it makes plans to house educational programs and student populations. Further, this report allows the Office of Educational Facilities Construction, Department of Education, to comply with Sections 235.41(1) and 235.435(1) of the Florida Statutes.

### Overview of Report

This is an annual report of the usage of rooms and student stations for instructional activities. Part 1 includes room-by-room data on room use and student station use for classrooms and class laboratories in owned facilities. Part 1 also includes a single entry for each campus or center for physical education instruction. Parts 2 and 3 contain summary information reflecting regularly scheduled instruction which occurs in unowned space.

The room data reported in Part 1 is matched against the room data contained in the Facilities Inventory file. Therefore, it is necessary that the same site, facility (building) and room numbers used in the Facilities Inventory be used for the rooms reported in the Space Utilization Report. If these numbers do not match, the data cannot be processed and the college will have to submit corrected information.

### Definitions and Instructions

The data for the report is collected by the college during and for one full week in October. In Part 1, the weekly room hours and weekly student stations hours of all regularly scheduled instruction, Monday through Friday only, are reported for each classroom (room-use code 110) and for each class laboratory (room-use code 210) for all owned buildings, excluding both those under construction and those structurally unsound, in the Facilities Inventory. Classes conducted on Saturday and Sunday are not included. When a classroom or class laboratory is not used for regularly scheduled instruction, zero weekly room hours and zero weekly student hours are reported.

Room Identification - A room is identified by its Site Number, Facility (building) Number, Room Number and Room Number Suffix. Each room reported in the Space Utilization Report must be identified the same way that it is carried in the Division Facilities Inventory.

Weekly Room Hours (WRH) - This is the number of hours that a room is used for regularly scheduled instruction during the selected five-day week in October. The use of one room for one hour during the week equals one WRH. If more than one class is scheduled into one room during the same hour, this counts only as one WRH. The maximum number of WRH that can be reported for one room is 120 since a room cannot be used more than 24 hours per day for five days.

Weekly Student Hours (WSH) - This is the total for the week of the number of hours that individual student stations within a room are used to seat the students officially enrolled in the courses scheduled into the room. The use of one student station for one hour during the week equals one WSH. To arrive at the total WSH for a room, first find the WSH for each course by multiplying the number of hours a course meets times the number of students in that course. Then add together the WSH for each of the courses that meet in the room during the week to get the total WSH for the room.

Physical education instruction is included in Part 1 of the report as a single entry for each campus or center. This entry contains the aggregate number of WRH and WSH of use for all athletic/physical education rooms (room-use code 520) on that site. For each site, the facility number used for reporting physical education instruction is that of the first facility listed in the Facilities Inventory for that site which contains a room with a room-use code of 520. The pseudo room number of 0835P is used since the data reported usually involves more than one room. Due to the aggregate method of reporting, more than 120 WRH may be shown for physical education.

In Parts 2 and 3, WRH and WSH are reported in summary form by subprogram code for all regularly scheduled instruction offered in unowned facilities. The instruction reported in Part 2 would be housed in owned facilities if they were available. Part 3 reflects courses and programs which are designed for use in unowned facilities or which do not require facilities.

## Formats for Reporting

The Division sends to each college a printout listing the appropriate rooms for which WRH and WSH are to be reported for Part 1. Data for rooms not shown on the printout can be reported on the SU-1, Part 1 form.

Data also will be accepted by card or tape. Please send non-labeled tapes. Any blocking factor is acceptable, but be sure to mark your tapes clearly. For IBM users, please indicate OS or DOS. Also, to speed processing, initialize tapes before writing the data set.

The following is the card or tape record layout:

| Item No. | Card Column | Field Width | Field Type | Field Name |
|---|---|---|---|---|
| 1 | 1 - 6 | 6 | N | College FICE Code |
| 2 | 7 - 8 | 2 | N | Site Number |
| 3 | 9 - 12 | 4 | N | Facility Number |
| 4 | 13 - 16 | 4 | A/N | Room Number |
| 5 | 17 | 1 | A/N | Room Suffix |
| 6 | 18 - 21 | 4 | N(1) | WRH |
| 7 | 22 - 27 | 6 | N(2) | WSH |
| 8 | 28 - 80 | 53 | Blank Filler | |

(1) Format 99V99 (implied decimal)

(2) Format 9999V99 (implied decimal)

Right justify all fields and fill with leading blanks or zeros.

All colleges are to submit information about instruction in unowned facilities on the forms SU-1, Part 2 and SU-1, Part 3.

Division of Community Colleges

## SPACE UTILIZATION REPORT

Academic Year:__________________ College:__________________________

Part 1 - Utilization of Owned Facilities

| Site Number | Facility Number | Room | | Weekly Room Hours | Weekly Student Hours |
|---|---|---|---|---|---|
| | | Number | Suffix | | |
| | | | | | |
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Date Prepared:________________________________ Prepared By:_____________________________

SU-1, Part 1 President's Signature:_____________________________

Division of Community Colleges

Academic Year:________________ College:__________________________

Part 2 - Instructional Activities Requiring Owned Facilities

Enter by subprogram code the WRH and WSH of all regularly scheduled instruction offered in unowned facilities which would be housed in owned facilities if they were available.

| Subprograms | Classrooms | | Class Laboratories | |
|---|---|---|---|---|
| | WRH | WSH | WRH | WSH |
| 1.1 Advanced & Professional | | | | |
| 1.2 Occupational | | | | |
| 1.3 Developmental<br>1.31 Compensatory | | | | |
| 1.32 Adult Elem. & Secondary | | | | |
| 1.4 Community Inst.Ser.<br>1.41 Citizenship | | | | |
| 1.42 Recre. & Leisure Time | | | | |
| TOTAL | | | | |

1.14.0835 Physical Education Activity requiring Athletic/Physical Education (520) facility: WRH____ WSH____

Date Prepared:________________ Prepared by:________________________

Signature of President:______________________________

Return to: Bureau of Research and Information Systems
Division of Community Colleges
Department of Education
Tallahassee, Florida 32301

SU-1, Part 2

Division of Community Colleges

Academic Year:__________________ College:___________________________

Part 3 - Instructional Activities Not Requiring Owned Facilities

Enter by subprogram code the WRH and WSH of all regularly scheduled instruction offered in unowned facilities for which owned facilities are not required. This includes courses and programs which are designed for use of unowned facilities (e.g., high schools, churches, public facilities, correctional institutions, etc.) or do not require facilities (e.g., external T.V. instruction).

| Subprograms | Classrooms | | Class Laboratories | |
|---|---|---|---|---|
| | WRH | WSH | WRH | WSH |
| 1.1 Advanced & Professional | | | | |
| 1.2 Occupational | | | | |
| 1.3 Developmental<br>1.31 Compensatory | | | | |
| 1.32 Adult Elem. & Secondary | | | | |
| 1.4 Community Inst.Ser.<br>1.41 Citizenship | | | | |
| 1.42 Recre. & Leisure Time | | | | |
| TOTAL | | | | |

1.14.0835 Physical Education Activity requiring Athletic/Physical Education (520) facility: WRH_______ WSH________

Date Prepared:__________________________ Prepared by:____________________________

Signature of President:______________________________

Return to: Bureau of Research and Information Systems
Division of Community Colleges
Department of Education
Tallahassee, Florida 32301

*State of Florida*
*Department of Education*
*Tallahassee, Florida*
*Ralph D. Turlington, Commissioner*
*An equal opportunity employer*

SU-1, Part 3

# SECTION 10

## PERSONNEL AND SALARY REPORT (SA-1)

## SALARIES OF SELECTED POSITIONS (SA-2)

### Purpose of the Report

Since each college has a unique salary schedule, it is necessary to develop reporting documents which can facilitate the communication of salary information in a compatible manner. The purpose of these reports is to display the basic professional salary schedule, actual salaries paid to professional college employees by educational level, work experience and contract length, and the salary rates for selected administrative positions.

### Instructions for Report SA-1

The information for the report is developed in October for each year and thus represents a snapshot of Term 1 (Fall) personnel distribution on the fiscal year salary schedule. The report is for full-time personnel and is divided into five parts:

Part 1 - Instructional
Part 2 - Instructional Department Administrators
Part 3 - Executive, Administrative and Managerial Personnel
Part 4 - Professional/Specialist
Part 5 - Salary Schedule Summary on Instructional Personnel

The basic format of the first four parts classifies personnel by contract length in days. This form is repeated three times for reporting up to three different contract lengths. To report more than three, please duplicate the appropriate form.

The following are the definitions and instructions to be used to complete the SA-1 report, Parts 1, 2, 3, and 4.

Personnel Category Definitions - One of the most critical aspects of this report is the proper classification of personnel by each college. The college should use the definitions found below to classify each full-time employee. These definitions were derived using as a guide A Manual for Manpower Accounting in Higher Education and A Handbook of Standard Terminology and A guide for Recording and Reporting Information About Educational Technology (National Center for Educational Statistics). These definitions are consistent with those required to complete the HEGIS and OCR (EEO-6) reports related to personnel and salaries. These relationships are mentioned to emphasize the need for each college to classify and code employees according to these definitions for both state and federal reporting.

Executive, Administrative, Managerial Personnel - This category includes employees who exercise primary responsibility for the management of the institution or of a department, or subdivision thereof, and who devote no more than 20 percent of their workweek to Fair Labor Standards Act (FLSA) non-exempt work. Assignments usually require the performance of work directly related to management policies or general business operations of the institution or the performance of functions in the administration of a department directly related to academic instruction.

This category will include employees with such job titles as president, comptroller, dean, director, assistant to the president, assistant dean, assistant director, coordinator, etc. It includes the head, chairperson, or other administrator of an academic department, or division, if such person is primarily an administrator exercising specific administrative authority while other duties are secondary. Such duties include:

1. Directing, scheduling, or supervising other board employees;
2. Evaluating and recommending the employment or termination of other board employees;
3. Allocating, managing and scheduling resources and facilities;
4. Serving in positions involving planning, development, and utilization of personnel, resources and facilities.

It is assumed that assignments in this category customarily and regularly require the incumbent to exercise discretion and independent judgement and to direct the work of others.

It includes, but is not limited to the following:

DEAN, ASSISTANT DEAN, DIRECTOR, ASSISTANT DIRECTOR, COORDINATOR, ASSISTANT COORDINATOR, VICE PRESIDENT, MANAGER, CHIEF,

OF

Academic Affairs
Admissions and Records
Alumni Affairs
Athletics
Basic Education
Career Service
Community Affairs (Relations)
Community Services
Comptroller
Continuing Education
Cooperative Education
Counseling
Data Processing (Systems)
Development
Employee Relations
Experimental Learning
Federal Programs
Financial Aid
Guidance
Health Services
High School Articulation
Institutional Research
Intramurals
Library
Management Systems
Maintenance
Personnel
Placement
Planning
Plant and Grounds
Public Information
Purchasing
Registration (Registrar)
Special Projects
Special Services (e.g., for disadvantaged students)
Student Affairs (Services)
Student Development
Systems Planning
Veterans Services (Affairs)

Instructional Personnel - Individuals employed for the primary purpose of performing instruction. It includes only exempt employees. Instructional personnel on sabbatical leave will be included at their regular salary. Replacements for these personnel should not be reported. Instructional personnel on leave without pay should not be reported; full-time replacement for these should be included. Do not include departmental administrative personnel if they perform any of the administrative duties listed above.

Instructional Department Administrators - This personnel category includes those persons that provide direct administrative support to instructional departments or divisions. Although these persons may be carrying a partial teaching load (in some cases the majority of their workload), they should be reported in this category if they are assigned administrative duties. The purpose of using this personnel category in the report is to prevent the distortion of either the Instructional or the Executive, Administrative, Managerial personnel categories by placing persons in them who have dual responsibilities.

Professional/Specialist Personnel - These employees are given assignments requiring knowledge of an advanced type in the field of science or learning or original and creative work in an artistic field and no more than 20 percent of their workweek is devoted to FLSA non-exempt work. This category includes such employees as librarians, accountants, architects, system analysts, counselors, attorneys, and other professional specialists employed for the primary purpose of performing or operating in the areas of academic support, student support, and institutional support. Do not, however, include individuals who have administrative or managerial responsibilities in these areas.

This category of employees is distinguished from Instructional and Executive, Administrative, Managerial personnel in that their primary activity is practice in their particular field rather than either administration, instruction, or research. For example, a reference librarian would be a Professional/Specialist employee, whereas the head of the library would be an administrator. Likewise a person performing the counseling function would be in a Professional/Specialist position rather than an Executive, Administrative, Managerial position.

Contract Length of ______ Days - Refers to the total contractual workdays in the contract period. This includes paid vacations but excludes official holidays which employees are not required to work. For Instructional Personnel this would usually be the number of instructional, exam and faculty workdays. For Administrative and other Professional personnel this would be the maximum number of "on-the job" days. Twelve month contracts should have a number around 252 days instead of 260 days since 260 is the maximum number of workdays in a year.

Educational Level - Represents a categorization of college professional staff according to five educational levels:

1. Earned Doctorate
2. Masters plus thirty (30) credit hours
3. Masters Degree
4. Bachelors Degree
5. Less Than Bachelors Degree

Under each contract length by educational level the following information is requested separately for men and women personnel:

1. Number of individuals in this category.
2. No. of CC's is the number of individuals reported above who have continuing contracts.
   Note: This does not apply to Part 3, Executive, Administrative, Managerial Personnel.
3. Mean Experience is the average number of years of experience for this group of employees considered in the determination of salary rates in the salary schedule of the college. It is determined for each category by summing the years of applicable experience for each individual and dividing by the total number of individuals in the category. Please indicate at the bottom of the form the maximum number of creditable years for experience on your salary schedule. In the event that applicable experience is not considered in the determination of salary rates, "N/A" will be entered in lieu of number of years or zero.

4. Mean Salary is the average salary paid for that category as determined by dividing the sum of all salaries (including supplements) for the particular contract length by the number of individuals in the category.

At the bottom of each part, please give the number of part-time people (headcount) employed and their total FTE as determined by the college's definition of full-time.

## Instructions for Report SA-1, Part 5 - Salary Schedule Summary for Instructional Personnel

This report is separated into two parts only one of which should be completed by each college. If your college uses professorial ranks, please complete the matrix on the bottom half of the page. For those colleges not using professorial rank, complete the matrix on the top portion of the page.

For each contract, report the number of work days and the minimum and maximum salaries by degree category or rank as specified in the college's salary schedule. Do not report what is currently being paid to someone in a category or the average salary of persons in a category.

Attach any comment which you would like to be appended to the Division Annual Salary Study.

## DIVISION OF COMMUNITY COLLEGES

Academic Year: ____________

## PERSONNEL AND SALARY REPORT

College: ________________________

### PART 1 – INSTRUCTIONAL PERSONNEL

Full-Time Personnel with Contract Length of ______ Days

| Educational Level | MEN | | | | WOMEN | | | |
|---|---|---|---|---|---|---|---|---|
| | Number | No. of CC's | Mean Exper. | Mean Salary | Number | No. of CC's | Mean Exper. | Mean Salary |
| Doctorate | | | | | | | | |
| Masters plus Thirty | | | | | | | | |
| Masters Degree | | | | | | | | |
| Bachelors Degree | | | | | | | | |
| Less than Bachelors | | | | | | | | |

10.5

Full-Time Personnel with Contract Length of ______ Days

| Educational Level | MEN | | | | WOMEN | | | |
|---|---|---|---|---|---|---|---|---|
| | Number | No. of CC.s | Mean Exper. | | Number | No. of CC's | Mean Exper. | Mean Salary |
| Doctorate | | | | | | | | |
| Masters plus Thirty | | | | | | | | |
| Masters Degree | | | | | | | | |
| Bachelors Degree | | | | | | | | |
| Less than Bachelors | | | | | | | | |

Full-Time Personnel with Contract Length of ______ Days

| Educational Level | MEN | | | | WOMEN | | | |
|---|---|---|---|---|---|---|---|---|
| | Number | No. of CC's | Mean Exper. | Mean Salary | Number | No. of CC's | Mean Exper. | Mean Salary |
| Doctorate | | | | | | | | |
| Masters plus Thirty | | | | | | | | |
| Masters Degree | | | | | | | | |
| Bachelors Degree | | | | | | | | |
| Less than Bachelors | | | | | | | | |

Maximum number of creditable years for which a salary increment is given is_____.

Total Part-Time ____________

Full-Time Equated ____________
(of Part-time)

SA-1
Page 1

NOTE: Please duplicate this form to report more than 3 contract periods.

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## DIVISION OF COMMUNITY COLLEGES

Academic Year: ________

## PERSONNEL AND SALARY REPORT

College: ________________

### PART 2 – INSTRUCTIONAL DEPARTMENT ADMINISTRATIVE PERSONNEL

| Full-Time Personnel with Contract Length of ______ Days | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Educational Level | MEN | | | | WOMEN | | | |
| | Number | No. of CC's | Mean Exper. | Mean Salary | Number | No. of CC's | Mean Exper. | Mean Salary |
| Doctorate | | | | | | | | |
| Masters plus Thirty | | | | | | | | |
| Masters Degree | | | | | | | | |
| Bachelors Degree | | | | | | | | |
| Less than Bachelors | | | | | | | | |

| Full-Time Personnel with Contract Length of ______ Days | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Educational Level | MEN | | | | WOMEN | | | |
| | Number | No. of CC.s | Mean Exper. | | Number | No. of CC's | Mean Exper. | Mean Salary |
| Doctorate | | | | | | | | |
| Masters plus Thirty | | | | | | | | |
| Masters Degree | | | | | | | | |
| Bachelors Degree | | | | | | | | |
| Less than Bachelors | | | | | | | | |

| Full-Time Personnel with Contract Length of ______ Days | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Educational Level | MEN | | | | WOMEN | | | |
| | Number | No. of CC's | Mean Exper. | Mean Salary | Number | No. of CC's | Mean Exper. | Mean Salary |
| Doctorate | | | | | | | | |
| Masters plus Thirty | | | | | | | | |
| Masters Degree | | | | | | | | |
| Bachelors Degree | | | | | | | | |
| Less than Bachelors | | | | | | | | |

Maximum number of creditable years for which a salary increment is given is ____.

Total Part-Time ________________

Full-Time Equated (of Part-time) ________________

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Page 2

NOTE: Please duplicate this form to report more than 3 contract periods.

## DIVISION OF COMMUNITY COLLEGES

Academic Year: ____________

## PERSONNEL AND SALARY REPORT

College: ____________________

### PART 3 – EXECUTIVE, ADMINISTRATIVE & MANAGERIAL PERSONNEL

Full-Time Personnel with Contract Length of ______ Days

| Educational Level | MEN | | | | WOMEN | | | |
|---|---|---|---|---|---|---|---|---|
| | Number | No. of CC's | Mean Exper. | Mean Salary | Number | No. of CC's | Mean Exper. | Mean Salary |
| Doctorate | | | | | | | | |
| Masters plus Thirty | | | | | | | | |
| Masters Degree | | | | | | | | |
| Bachelors Degree | | | | | | | | |
| Less than Bachelors | | | | | | | | |

Full-Time Personnel with Contract Length of ______ Days

| Educational Level | MEN | | | | WOMEN | | | |
|---|---|---|---|---|---|---|---|---|
| | Number | No. of CC.s | Mean Exper. | | Number | No. of CC's | Mean Exper. | Mean Salary |
| Doctorate | | | | | | | | |
| Masters plus Thirty | | | | | | | | |
| Masters Degree | | | | | | | | |
| Bachelors Degree | | | | | | | | |
| Less than Bachelors | | | | | | | | |

Full-Time Personnel with Contract Length of ______ Days

| Educational Level | MEN | | | | WOMEN | | | |
|---|---|---|---|---|---|---|---|---|
| | Number | No. of CC's | Mean Exper. | Mean Salary | Number | No. of CC's | Mean Exper. | Mean Salary |
| Doctorate | | | | | | | | |
| Masters plus Thirty | | | | | | | | |
| Masters Degree | | | | | | | | |
| Bachelors Degree | | | | | | | | |
| Less than Bachelors | | | | | | | | |

Maximum number of creditable years for which a salary increment is given is_____.

Total Part-Time ____________

Full-Time Equated ____________
(of Part-time)

SA-1
Page 3

NOTE: Please duplicate this form to report more than 3 contract periods.

## DIVISION OF COMMUNITY COLLEGES

Academic Year: ____________

## PERSONNEL AND SALARY REPORT

College: ____________________

### PART 4 – NON-INSTRUCTIONAL PROFESSIONAL PERSONNEL

| Full-Time Personnel with Contract Length of ______ Days | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Educational Level | MEN | | | | WOMEN | | | |
| | Number | No. of CC's | Mean Exper. | Mean Salary | Number | No. of CC's | Mean Exper. | Mean Salary |
| Doctorate | | | | | | | | |
| Masters plus Thirty | | | | | | | | |
| Masters Degree | | | | | | | | |
| Bachelors Degree | | | | | | | | |
| Less than Bachelors | | | | | | | | |

| Full-Time Personnel with Contract Length of ______ Days | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Educational Level | MEN | | | | WOMEN | | | |
| | Number | No. of CC's | Mean Exper. | | Number | No. of CC's | Mean Exper. | Mean Salary |
| Doctorate | | | | | | | | |
| Masters plus Thirty | | | | | | | | |
| Masters Degree | | | | | | | | |
| Bachelors Degree | | | | | | | | |
| Less than Bachelors | | | | | | | | |

| Full-Time Personnel with Contract Length of ______ Days | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Educational Level | MEN | | | | WOMEN | | | |
| | Number | No. of CC's | Mean Exper. | Mean Salary | Number | No. of CC's | Mean Exper. | Mean Salary |
| Doctorate | | | | | | | | |
| Masters plus Thirty | | | | | | | | |
| Masters Degree | | | | | | | | |
| Bachelors Degree | | | | | | | | |
| Less than Bachelors | | | | | | | | |

Maximum number of creditable years for which a salary increment is given is_____.

Total Part-Time ____________

Full-Time Equated (of Part-time) ____________

SA–1
Page 4

NOTE: Please duplicate this form to report more than 3 contract periods.

## PERSONNEL AND SALARY REPORT

Academic Year: ____________ College: ____________

**Part 5 – Salary Schedule Summary for Instructional Personnel**

A. Summary of Salary Schedule for Instructional Personnel for Colleges NOT using Professorial Rank

| Contract Length | Doctorate | | Masters Degree Plus Thirty | | Masters Degree | | Bachelors Degree | | Less Than a Bachelors Degree | |
|---|---|---|---|---|---|---|---|---|---|---|
| Days | Min. | Max. | Min. | Max. | Min. | Max. | Min. | Max. | Min. | Max. |
| | | | | | | | | | | |
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| | | | | | | | | | | |

B. Summary of Salary Schedule for Instructional Personnel for Colleges Using Professorial Rank

| Contract Length | Professor | | Associate Professor | | Assistant Professor | | Senior Master Instructor | | Instructor | |
|---|---|---|---|---|---|---|---|---|---|---|
| Days | Min. | Max. | Min. | Max. | Min. | Max. | Min. | Max. | Min. | Max. |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
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State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
An equal opportunity employer

Prepared By: ____________

Date Prepared: ____________

# SALARIES OF SELECTED POSITIONS

## (SA-2)

Instructions

The Annual Salary Rate should be the 12 month salary rate as of October 1. The cost of fringe benefits should not be included. In the event that the salary rate is for a period less than twelve months, please indicate with a footnote of explanation. If a position is vacant on October 1, please use the budgeted salary rate for that position along with a footnote of explanation. The salary rate reported should be for the individual with the overall responsibility for that function (i.e., Dean of Business Affairs is the Chief Business Affairs Officer). Institutions with more than one person in a particular function (e.g., Campus Vice President) should report the highest salary rate paid.

DIVISION OF COMMUNITY COLLEGES

SALARIES OF SELECTED POSITIONS

ACADEMIC YEAR:__________ COLLEGE:____________________

| POSITION | ANNUAL SALARY RATE |
|---|---|
| President | |
| Executive Vice President | |
| Provost/Campus Vice President | |
| Chief Academic Affairs Officer | |
| Chief Business Affairs Officer | |
| Chief Student Affairs Officer | |
| Chief Librarian/Learning Resources | |
| Chief Student Records (Registrar) | |
| and/or Director of Admissions | |

Prepared by:________________________________

Date Prepared:________________________________

Return to: Bureau of Research and Information Systems
Division of Community Colleges
Department of Education
Tallahassee, Florida 32301

## SECTION 11

# FTE ENROLLMENT REPORT
(FA-2,3,4)

### Purpose of These Reports

The information contained in these reports is used in planning activities carried on by the Division. The FA-4 enrollment data are audited to determine if the student semester hours reported are accurate and properly recorded. The FA-4 enrollment data should be used by the college in its cost analysis. It is therefore necessary that each college maintain a student accounting system with accurate and auditable records for the initial registration and each subsequent registration in each term.

The three reports have the same format and should contain the following enrollment data:

| | |
|---|---|
| FA-2 | Actual Initial Fall enrollment with estimates of enrollment for the remainder of the year. Only the Initial and Total Registration columns need to be completed for the estimated terms. Include Other Registration figures in Initial Registration column for the estimated terms so that this column is identical with the Total Registration column. |
| FA-3 | Actual Fall and Initial Winter enrollment with estimates of enrollment for the remainder of the year. For the Summer Term include Other Registration with Initial Registration so that the columns for Initial Registration and Total Registration are identical. |
| FA-4 | Actual Fall, Winter, and Summer enrollment for all registrations. In this report all the columns are completed. |

### Instructions

All credit hours for which students register in credit courses and all credit hour equivalents for non-credit courses must be included in the student semester hours reported. A student is officially registered for a course when either the payment of the required fees, waiver of fees, or deferment of fees transaction is completed and recorded in the financial and student records maintained by the college. The student semester hours reported should not include those for students who withdraw from courses and received a total or partial refund.

In the event that adjustments must be made to actual enrollment data reported previously, the corrected enrollment should be entered in the appropriate column(s).

A cutoff date has been established for course numbering updates so that adjustments in FTE Enrollment Report (FA-4) and the Cost Analysis Reports (CA) do not have to be made on a retroactive basis. The cutoff date is September 1. Course numbering classification changes made after September 1 will not be included in FTE Enrollment or Cost Analysis reports until the following academic year. Course numbering updates will be identified with an "effective academic year".

There may be instances where courses begin in one academic year and end in the next. Student semester hours for these courses will be reported in the academic year in which the course ends.

Definitions

Student Semester Hours - These are determined by the number of student credit hours in credit courses and student credit hour equivalents in non-credit courses for which students are duly registered during each term. Report semester hours to one (1) decimal place (similar to CA-3).

Initial Registration - Include in this column student semester hours for those students officially registered during the major registration at, or prior to, the beginning of the term.

Other Registrations - In this column report the number of student semester hours for students registering at times other than the initial registration. Note that "Other Registrations" does not refer to "Drop/Adds" or other adjustments to the Initial Registration.

Total Registrations - This is the sum of the student semester hours and semester hour equivalents reported in the Initial and Other Registrations for any term.

Total Year S.S.H. - This is the sum of the Total Registrations for each of the three terms.

Credit Hour Equivalents - These are the computed equivalents of student semester hours for courses in which no credit is awarded (non-credit courses). Student semester hour equivalents are computed by dividing the total number of Instructional Hours by 27. Instructional hours are computed by multiplying the number of students officially registered by the number of hours that the course meets; i.e., the number of hours each student receives instruction.

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**State of Florida**
**Department of Education**
**Tallahassee, Florida**
**Ralph D. Turlington, Commissioner**
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DIVISION OF COMMUNITY COLLEGES
FTE ENROLLMENT REPORT
(Student Semester Hours)

Page 1 of 2

College: ______________________

11.3

| Code Discipline | Fall | | | Winter | | | Summer | | | TOTAL YEAR SSH |
|---|---|---|---|---|---|---|---|---|---|---|
| 1.1 Advanced & Professional | Initial Regist. | Other Regist. | Total Regist. | Initial Regist. | Other Regist. | Total Regist. | Initial Regist. | Other Regist. | Total Regist. | |
| 1.11.01 Agric. & Nat. Res. | | | | | | | | | | |
| 1.11.02 Archit. & Environ. | | | | | | | | | | |
| 1.11.04 Biological Science | | | | | | | | | | |
| 1.11.09 Engineering | | | | | | | | | | |
| 1.11.12 Health Professions | | | | | | | | | | |
| 1.11.19 Physical Sciences | | | | | | | | | | |
| 1.12.10 Fine and Applied Arts | | | | | | | | | | |
| 1.13.11 Foreign Languages | | | | | | | | | | |
| 1.13.15 Letters | | | | | | | | | | |
| 1.14.08 Education | | | | | | | | | | |
| 1.15.05 Business & Management | | | | | | | | | | |
| 1.16.07 Computer & Infor. Sci. | | | | | | | | | | |
| 1.16.17 Mathematics | | | | | | | | | | |
| 1.17.03 Area Studies | | | | | | | | | | |
| 1.17.20 Psychology | | | | | | | | | | |
| 1.17.22 Social Sciences | | | | | | | | | | |
| 1.18.06 Communications | | | | | | | | | | |
| 1.18.13 Home Economics | | | | | | | | | | |
| 1.18.14 Law | | | | | | | | | | |
| 1.18.16 Library Science | | | | | | | | | | |
| 1.18.18 Military Science | | | | | | | | | | |
| 1.18.21 Public Affairs | | | | | | | | | | |
| 1.18.23 Theology | | | | | | | | | | |
| 1.18.49 Interdisciplinary | | | | | | | | | | |
| TOTAL ADVANCED & PROFESSIONAL | | | | | | | | | | |

FA-2,3,4

FTE ENROLLMENT REPORT (Continued)

Page 2 of 2

| Code Discipline | | Fall | | | Winter | | | Summer | | | TOTAL YEAR SSH |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1.2 Occupational | | Initial Regist. | Other Regist. | Total Regist. | Initial Regist. | Other Regist. | Total Regist. | Initial Regist. | Other Regist. | Total Regist. | |
| 1.21 Agriculture | 1. Technical | | | | | | | | | | |
| | 2. Skilled/Semi-Skilled | | | | | | | | | | |
| | 3. Supplemental | | | | | | | | | | |
| 1.22 Distributive | 1. Technical | | | | | | | | | | |
| | 2. Skilled/Semi-Skilled | | | | | | | | | | |
| | 3. Supplemental | | | | | | | | | | |
| 1.23 Health | 1. Technical | | | | | | | | | | |
| | 2. Skilled/Semi-Skilled | | | | | | | | | | |
| | 3. Supplemental | | | | | | | | | | |
| 1.24 Home Economics | 1. Technical | | | | | | | | | | |
| | 2. Skilled/Semi-Skilled | | | | | | | | | | |
| | 3. Supplemental | | | | | | | | | | |
| 1.25 Office | 1. Technical | | | | | | | | | | |
| | 2. Skilled/Semi-Skilled | | | | | | | | | | |
| | 3. Supplemental | | | | | | | | | | |
| 1.26 Trade & Industrial | 1. Technical | | | | | | | | | | |
| | 2. Skilled/Semi-Skilled | | | | | | | | | | |
| | 3. Supplemental | | | | | | | | | | |
| 1.27 Public Service | 1. Technical | | | | | | | | | | |
| | 2. Skilled/Semi-Skilled | | | | | | | | | | |
| | 3. Supplemental | | | | | | | | | | |
| TOTAL OCCUPATIONAL | | | | | | | | | | | |

| Code Discipline | | Fall | | | Winter | | | Summer | | | TOTAL YEAR SSH |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Initial Regist. | Other Regist. | Total Regist. | Initial Regist. | Other Regist. | Total Regist. | Initial Regist. | Other Regist. | Total Regist. | |
| 1.3 Developmental | 1.31 Compensatory | | | | | | | | | | |
| | 1.32 Adult Elemen. & Secondary | | | | | | | | | | |
| **Total Developmental** | | | | | | | | | | | |
| 1.4 Community Instruct. Serv. | 1.41 Citizenship | | | | | | | | | | |
| | 1.42 Recreational & Leisure | | | | | | | | | | |
| **Total Community Instruct. Serv.** | | | | | | | | | | | |
| TOTAL INSTRUCTION | | | | | | | | | | | |

Prepared by: ______________________ Signed: ______________________ Signed: ______________________

Chairman, Board of Trustees

President

Date Prepared: ______________________

## SECTION 12

## OPENING FALL ENROLLMENT HEADCOUNT

## (EF-1)

### PURPOSE OF THE REPORT

This report displays descriptive information of the opening fall enrollments experienced by each college. The information collected is used to complete HEGIS reports and to prepare analytical reports for distribution to colleges, Division staff and other State agencies. The data for generating these reports should be collected and tabulated as of the last date on which students can add courses for the regular Fall term as printed in the official college catalog.

THIS REPORT SHOULD INCLUDE ONLY STUDENTS ENROLLED IN COURSES WHICH ARE DESIGNATED BY THE COLLEGE AS BEING COLLEGE LEVEL COURSES FOR WHICH CREDIT IS AWARDED FOR SATISFACTORY COMPLETION.

### DEFINITIONS AND INSTRUCTIONS

Subprogram and Clusters:

1.1 Advanced and Professional - These are curricular programs established to provide the first two years of course work leading to an advanced or professional degree. Students classified as advanced and professional intend to complete at least a bachelors degree or complete the necessary lower division requirements for such a degree.

1.2 Occupational Instruction (Credit) - These are curricular programs designated to prepare persons for an occupation. They are considered "credit" when the course requirements are made up of college level credit courses. Students classified as credit occupational intend to complete such a program.

1.9 Other Personal Objectives - These are persons taking college credit courses but do not intend to complete an Advanced and Professional or Occupational program. An example would be a teacher taking a course for certificate renewal.

"F-T" (Full-Time Student) - A student registered for 12 or more credits during the current term.

"P-T" (Part-Time Student) - A student registered for 11 or less credits during the current term.

First Time in College - A person who has not attended any college prior to the current term. Three subcategories of first time in college are used in this report:

1. Early Admissions Students - Students registered for college credit courses prior to graduation from high school. This includes persons classified in early admission status, those accumulating credit prior to graduation in "credit banks," and/or admitted under special status pending completion and/or graduation from high school.

2. Previous Year High School Graduate - Students who have graduated from high school during the previous academic year. This includes persons who completed high school the previous year and enrolled at the college for courses during the summer term.

3. Other - Students who did not graduate from high school during the previous year. This category includes persons who completed and/or graduated from high school prior to the previous academic year, those who completed high school requirements by examination (GED), and those categorized as "adult students" who have not graduated or completed high school requirements.

Returning Students - A person who has previously enrolled in at least one credit course at the college and has not attended another college or university (except as an itinerant student) since his or her last attendance at the reporting college. (An itinerant or transient student is one temporarily enrolled in another institution who plans to return to the original institution to complete his or her program.) There are two subcategories used in the report:

1. Enrolled Previous Year - A person enrolled in at least one credit course during the previous academic year.

2. Not Enrolled Previous Year - A person whose last enrollment was in the reporting college but it was prior to the previous academic year. If a student attended another college during the intervening period, he or she should be classified as a transfer.

Transfer Students - A person whose last enrollment was in another institution (except as an itinerant student). Two subcategories are used:

1. In-State Institution - A person whose last enrollment was at an institution in the State.

2. Out-of-State Institution - A person whose last enrollment was at an institution out of the State.

Freshmen - Persons who have earned from 0 through 23 credits of college level course work. Credits may be earned at other colleges or universities or by examination (CLEP), etc.

First-Time Freshmen - Entering freshman who have not previously attended any college. Include students enrolled in the fall term who attended college for the first-time in the preceding summer. Also include students who entered with advance standing at the freshman level.

Sophomores - Persons who have not yet earned their associate degree, or equivalent, but have earned 24 or more credits of college level course work.

Unclassified - Those students who are not candidates for a degree or other formal award, although they are taking credit courses.

Total Credits Enrolled For - Enter the total number of credit hours that were taken by the total number of students reported on each line. This count should be determined by the classification of the student, NOT by the level of the course.

Report Balancing - The number of first-time full-time and first-time part-time students are also included in the counts of full-time and part-time freshmen. Also, the total number of full-time and part-time students in the lower matrix must equal the total number of students indicated in the total line of the upper matrix.

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
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## DIVISION OF COMMUNITY COLLEGES
## OPENING FALL ENROLLMENT HEADCOUNT

College: ______________________________

| CLASSIFICATION | 1.1 Advanced & Professional | | | | 1.2 Occupational (Credit) | | | | 1.9 Other Objectives | | | | LINE TOTAL |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | MALE | | FEMALE | | MALE | | FEMALE | | MALE | | FEMALE | | |
| | F-T | P-T | F-T | P-T | F-T | P-T | F-T | P-T | F-T | P-T | F-T | P-T | |
| First Time in College | | | | | | | | | | | | | |
| Early Admissions | | | | | | | | | | | | | |
| Previous Year H.S. Grad. | | | | | | | | | | | | | |
| Other | | | | | | | | | | | | | |
| Returning Students | | | | | | | | | | | | | |
| Enrolled Previous Year | | | | | | | | | | | | | |
| Not Enrolled Previous Year | | | | | | | | | | | | | |
| Transfer Students | | | | | | | | | | | | | |
| In-State Institution | | | | | | | | | | | | | |
| Out-Of-State Institution | | | | | | | | | | | | | |
| TOTAL | | | | | | | | | | | | | * |

12.4

| CLASSIFICATION | Non-Resident Alien | | Black Non-Hispanic | | American Indian or Alaskan Native | | Asian or Pacific Islander | | Hispanic | | White Non-Hispanic | | Total (Sum of all columns) | | Total Credits Enrolled For |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| All Students Enrolled | Male | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | Female | |
| FULL-TIME STUDENTS | | | | | | | | | | | | | | | |
| Full-Time Freshman | | | | | | | | | | | | | | | |
| First-Time FT Freshmen | | | | | | | | | | | | | | | |
| Full-Time Sophomores | | | | | | | | | | | | | | | |
| Full-Time Unclassified | | | | | | | | | | | | | | | |
| Total Full-Time Students | | | | | | | | | | | | | * | * | |
| PART-TIME STUDENTS | | | | | | | | | | | | | | | |
| Part-Time Freshman | | | | | | | | | | | | | | | |
| First-Time PT Freshmen | | | | | | | | | | | | | | | |
| Part-Time Sophomores | | | | | | | | | | | | | | | |
| Part-Time Unclassified | | | | | | | | | | | | | | | |
| Total Part-Time Students | | | | | | | | | | | | | * | * | |

EF-1
3/1/77

*The sum of the full-time and part-time enrollment in the lower matrix must equal the total in the upper matrix.

Prepared by: ______________________________

Signed: ______________________________
President

Date Prepared: ______________________________

## SECTION 13

# FALL ENROLLMENT HEADCOUNT BY AGE GROUPS
## (FE-1)

### Purpose of the Report

This report displays final Fall headcount enrollments by Racial/Ethnic categories and by Sex for Age Groups beginning with the 15-19 group and ending with the 65 and over group.

It is used by the Commissioner's office as a basis for enrollment projections and other research studies. Furthermore, it will be used by the Division to answer legislative and other student profile questions. The by-age groups and full-time/part-time students is sometimes used to distribute enrollments from other reporting documents.

### General Instructions

This report should reflect headcount enrollments as of the last date on which students can add courses for the regular Fall term as printed in the official college catalog. It is an unduplicated headcount of Fall enrollments. Where a duplication exists between subfunctions, such as between 1.1 Advanced and Professional and 1.3 Developmental, the enrollments would be reported only once under the highest level subfunction. Advanced and Professional is the highest level subfunction; Other Personal Objectives, the lowest. In the above illustration, the enrollments would be reported only under 1.1. Advanced and Professional. The following list of subfunctions ranks from highest to lowest for purposes of reporting dual headcount enrollments as unduplicated.

1.1 Advanced and Professional Instruction
1.2 Occupational Instruction
1.3 Developmental Instruction
1.4 Community Instructional Services
1.9 Other Personal Objectives

### Definitions

### 1.1 Advanced and Professional Instruction

This subfunction includes courses and instructional programs designed to provide the first two years of course work leading to an advanced or professional degree (bachelors, first professional, masters, etc.). It includes both the general education and specialized lower division courses necessary to complete a transfer degree program. It does not include non-credit courses, specifically designed compensatory (remedial) courses, or vocational and technical courses (see definition of Occupational Instruction).

### 1.2 Occupational Instruction

This subfunction includes all courses (credit and non-credit) and instructional programs designed to prepare persons for an occupation without subsequent training or education in an institution of higher education or to provide courses to upgrade job related skills. Many of the courses classified as occupational instruction are transferable to a State university to apply toward a bachelors degree; however, they are placed in this subfunction since they are required for an occupational degree or certificate because of their specialized content. This classification standard was adopted to provide consistent classification of those courses which serve both a transfer and occupational preparatory purpose.

### 1.3 Developmental Instruction

This subfunction includes the courses and instructional programs designed to prepare persons for college entry. It also includes courses considered basic and general education at the elementary and high school level. It should not include occupational courses.

### 1.4 Community Instructional Services

This subfunction includes non-credit instructional courses designed to meet community needs or to provide recreational or leisure-time activities. Occupational non-credit (supplemental) sources should not be classified in this subfunction, rather they should be placed in the appropriate occupational category.

### 1.9 Other Personal Objectives

These are persons from the college community who take courses for various reasons other than to complete a degree or certificate program offered by the college. This subfunction is established to account for students who do not intend to complete an instructional program offered by the college, but who are taking credit courses to satisfy their personal objectives. An example would be a teacher taking a course to be used for renewal of his certificate, in which case the teacher is not seeking to complete degree or certificate requirements.

This subfunction is used only when accounting for students by instructional program. It is not applicable to the classification of courses or disciplines.

### Column Heading Instructions

Non-Resident Alien - A person who is not a citizen of the United States and who is in this country on a temporary basis and does not have the right to remain indefinitely. Resident aliens, non-citizens who have been lawfully admitted for permanent residence (and who hold a "green card" Form 1-151), are to be reported in the appropriate racial/ethnic categories along with United States citizens. Non-resident aliens are to be reported separately, on the lines provided, rather than in any of the five racial/ethnic categories which follow.

Black, Non-Hispanic - A person having origins in any of the black racial groups (except those of Hispanic origin).

American Indian or Alaskan Native - A person having origins in any of the original peoples of North America, and who maintains cultural identification through tribal affiliation or community recognition.

Asian or Pacific Islander - A person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian Subcontinent, or the Pacific Islands. This area includes, for example, China, Japan, Korea, the Philippine Islands, and Samoa.

Hispanic - A person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origina, regardless of race.

White, Non-Hispanic - A person having origins in any of the original peoples of Europe, North Africa, or the Middle East (except those of Hispanic origin).

Racial/ethnic designations as used in this survey do not denote scientific definitions of anthropological origins. For the purpose of this report, a student may be included in the group to which he or she appears to belong, identifies with, or is regarded in this community as belonging. However, no person may be counted in more than one racial/ethnic group.

Full-time and part-time student designations will apply only to credit students in the Advanced and Professional and Occupational programs. In Developmental, C.I.S. and Other Personal Objectives programs, the full-time, part-time designation is not required.

F-T (Full-Time Student) - A student registered for 12 or more credits during the current term.

P-T (Part-Time Student) - A student registered for 11 or less credits during the current term.

Row Heading Instructions

Age Group - Report students in the appropriate age group. If age is unknown, classify accordingly. Wherever possible, avoid use of the Age Unknown category.

Total - Totals should crossfoot, down and across for each subfunction.

## DIVISION OF COMMUNITY COLLEGES
## FALL ENROLLMENT HEADCOUNT BY AGE GROUPS

College:____________________

**1.1 Advanced and Professional**

| Age Group | Race/Ethnic Identification | | | | | | Sex | | TOTAL |
|---|---|---|---|---|---|---|---|---|---|
| | Non-Resident Aliens | Black Non-Hispanic | American Indian or Alaskan Native | Asian or Pacific Islander | Hispanic | White | Male | Female | |
| 15-19 | | | | | | | | | |
| 20-24 | | | | | | | | | |
| 25-29 | | | | | | | | | |
| 30-34 | | | | | | | | | |
| 35-39 | | | | | | | | | |
| 40-44 | | | | | | | | | |
| 45-49 | | | | | | | | | |
| 50-54 | | | | | | | | | |
| 55-59 | | | | | | | | | |
| 60-64 | | | | | | | | | |
| 65-Over | | | | | | | | | |
| Age Unknown | | | | | | | | | |
| TOTAL | | | | | | | | | |

**1.2 Occupational**

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 15-19 | | | | | | | | | |
| 20-24 | | | | | | | | | |
| 25-29 | | | | | | | | | |
| 30-34 | | | | | | | | | |
| 35-39 | | | | | | | | | |
| 40-44 | | | | | | | | | |
| 45-49 | | | | | | | | | |
| 50-54 | | | | | | | | | |
| 55-59 | | | | | | | | | |
| 60-64 | | | | | | | | | |
| 65-Over | | | | | | | | | |
| Age Unknown | | | | | | | | | |
| TOTAL | | | | | | | | | |

**1.3 Developmental**

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 15-19 | | | | | | | | | |
| 20-24 | | | | | | | | | |
| 25-29 | | | | | | | | | |
| 30-34 | | | | | | | | | |
| 35-39 | | | | | | | | | |
| 40-44 | | | | | | | | | |
| 45-49 | | | | | | | | | |
| 50-54 | | | | | | | | | |
| 55-59 | | | | | | | | | |
| 60-64 | | | | | | | | | |
| 65-Over | | | | | | | | | |
| Age Unknown | | | | | | | | | |
| TOTAL | | | | | | | | | |

FE-1

## DIVISION OF COMMUNITY COLLEGES

## FALL ENROLLMENT HEADCOUNT BY AGE GROUPS

College: ____________________

### 1.4 Community Instructional Services

| Age Group | Race/Ethnic Identification | | | | | | Sex | | TOTAL |
|---|---|---|---|---|---|---|---|---|---|
| | Non-Resident Aliens | Black Non-Hispanic | American Indian or Alaskan Native | Asian or Pacific Islander | Hispanic | White | Male | Female | |
| 15-19 | | | | | | | | | |
| 20-24 | | | | | | | | | |
| 25-29 | | | | | | | | | |
| 30-34 | | | | | | | | | |
| 35-39 | | | | | | | | | |
| 40-44 | | | | | | | | | |
| 45-49 | | | | | | | | | |
| 50-54 | | | | | | | | | |
| 55-59 | | | | | | | | | |
| 60-64 | | | | | | | | | |
| 65-Over | | | | | | | | | |
| Age Unknown | | | | | | | | | |
| TOTAL | | | | | | | | | |

13.5

### 1.9 Other Personal Objectives

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 15-19 | | | | | | | | | |
| 20-24 | | | | | | | | | |
| 25-29 | | | | | | | | | |
| 30-34 | | | | | | | | | |
| 35-39 | | | | | | | | | |
| 40-44 | | | | | | | | | |
| 45-49 | | | | | | | | | |
| 50-54 | | | | | | | | | |
| 55-59 | | | | | | | | | |
| 60-64 | | | | | | | | | |
| 65-Over | | | | | | | | | |
| Age Unknown | | | | | | | | | |
| TOTAL | | | | | | | | | |

FE-1

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
An equal opportunity employer

Prepared By: ____________________

Date Prepared: ____________________

# SECTION 14

## ANNUAL HEADCOUNT REPORTS
## (AA-1, EA-3)

This section contains those reports and instructions dealing with annual enrollments and terminations. The AA-1/EA-3 Series provides information about PROGRAM ENROLLMENTS AND TERMINATIONS. Each report in this series is listed and identified below:

| Report Identification | Report Name |
|---|---|
| AA-1A | Program Enrollments and Terminations (Advanced and Professional, Occupational Programs) |
| AA-1B | Undecided Enrollments |
| AA-1C | Supplemental and Apprenticeship Enrollments |
| AA-1D | Special Sections Enrollment (Vocational) |
| AA-1E | First-Time-In-College, Early Exit, GED Students |
| EA-3 | Developmental, Community Instructional Services, Other Personal Objectives Enrollment |

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# PROGRAM ENROLLMENTS AND TERMINATIONS

## AA-1A

## Purpose of the Report

The purpose of this report is to provide a program-by-program accounting of student enrollments and terminations. The college should prepare a separate form for each program of study offered by the college. This information is used by the Division of Community Colleges to prepare reports for the Department of Education (Division of Vocational Education) and Legislature, and to prepare Federal and regional reports for each college. These reports include Office for Civil Rights (OCR) Fall Enrollment and Compliance, Higher Education General Information Survey (HEGIS) Earned Degrees, and Vocational Education Data System (VEDS).

## General Instructions

Time Frame Covered by the Report - The data for this report are for the prior Academic Year which begins with the Fall semester and ends with the completion of the Summer semester.

Due Date for the Report - Refer to the Chart of Reports in Section 1.

Definition of Program Study - This is a group or combination of related courses, self contained classes, or instructional units organized for the attainment of specified educational objectives. Each program must be reported on a separate form so that the Division can complete the required Federal reports. Programs designed for transfer (or university parallel) purposes may be considered one program for this report. However, it is preferable that these programs be identified to one of the other eight clusters indicated on page 2.10. A vocational preparatory program consists of a course or a group of related courses and instructional activities through which students can achieve the competencies required for entry into an occupation or a cluster of closely related occupations. The college must obtain the program objective of each student each time he or she registers. Procedures should be developed by each college to obtain an accurate statement of student intent. Those students who have demonstrated no intent to complete a curricular program offered by the college, but who are taking credit courses to satisfy their personal objectives should be reported on the EA-3 report form as "Other Personal Objectives Enrollment".

For the purpose of this report, do not include as a program of study those supplemental courses offered by the college. These courses are primarily designed for job skill updating and retraining of those persons already employed in the field and these should be reported on the AA-1C report.

A separate special form (AA-1B) has been included for those students that have not decided (Undecided) on the program of study which they will pursue or have not been accepted into a limited access program (e.g., dental hygiene). Do not include A.A. degree seeking students who have not selected a major. These persons should be included in 1.19 General Degree Transfer. It is important to note that this form does not provide for "Completions" since each graduate (completer) must be identified with a program of study.

New Programs, Program Changes, Program Deletions - These actions should be reported on the AA-1A form with appropriate notation to indicate the kind of action. When these take place at other than initial submission of the AA-1A reports, a letter of explanation should accompany.

## Detail Instructions

### Program Information - Top Portion of the Form

Program Code - This is the eight digit code which identifies each program offered by the college during the academic year being reported. These codes are found in the Community College Information Classification Structure. Refer to the documentation in Appendix A of the CCMIS Procedures Manual to verify coding or to assign codes to new programs.

Program Title - This is the title which the college uses for the program. Note that the Program Code and Program Title shown in the Program Inventory printout will be used until a change is submitted.

New Program - Indicate "X" if yes. Ignore, if not a new program. This will provide information about the number of new programs initiated by the colleges.

Correction - Indicate "X" if yes. Ignore, if not a correction. This data item will facilitate program change.

Occupational Program Type - An occupational program is one designed to prepare persons for immediate employment in an occupation (including homemaking). There are two levels of occupational programs offered in community colleges, namely;

A. Post-secondary Technical (courses and programs of study) - This includes programs of study and their related courses designed to prepare persons for employment at the technical level which is between that of the skilled and the professional. These are usually two-year programs of study made up of college level credit courses which are, for the most part, transferable.

B. Post-secondary Skilled/Semi-skilled (courses and programs of study) - This includes programs of study and their related courses designed to prepare students for employment at a semi-skilled or skilled level which is between that of the unskilled and the technician. These are usually clock-hour or institutional credit programs and courses.

Program Length - Enter the number of Semester Credit Hours or Clock Hours required to complete the program.

Completion Award Type - Check the appropriate award type based on the definitions provided below even though your college may use a different title for a degree or certificate:

A. Associate in Arts - An award certifying the completion of a two-year lower division undergraduate program of study which is applicable to a bachelors or advanced degree.

B. Associate in Science Degree - An award certifying the completion of a two-year technical program of study. In some cases students completing these programs transfer to a university to complete a higher level degree in the field. Therefore, the AS degree is not necessarily a terminal degree.

C. Technical Certificate - An award certifying the completion of technical programs of study consisting principally of the prescribed specialized courses in the program area. These are programs which usually consist of one academic year of full-time study.

D. Associate in Applied Science - An award certifying the completion of a two-year skilled/semi-skilled program of study.

E. Certificate of Applied Sciences - An award certifying the completion of a vocational program of study which is usually of a duration longer than one term (semester), but less than two years of full-time study.

F. Certificate of Training - An award certifying the completion of a vocational program of study which is one term (semester) or less of full-time study.

## Column Heading Instructions

The columns of the report provide for a distribution by sex and race for certain information items. This information is required for the OCR Earned Degree report and also is used as a part of the compliance report for the State plan.

Non-Resident Alien - A person who is not a citizen of the United States and who is in this country on a temporary basis and does not have the right to remain indefinitely. Resident aliens, non-citizens who have been lawfully admitted for permanent residence (and who hold a "green card" Form 1-151), are to be reported in the appropriate racial/ethnic categories along with United States citizens. Non-resident aliens are to be reported separately, in the columns provided, rather than in any of the five racial/ethnic categories which follow.

Black, Non-Hispanic - A person having origins in any of the black racial groups of Africa (except those of Hispanic origin).

American Indian or Alaskan Native - A person having origins in any of the original peoples of North America, and who maintain cultural identification through tribal affiliation or community recognition.

Asian or Pacific Islander - A person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian Subcontient, or the Pacific Islands. This area includes, for example, China, Japan, Korea, the Philippine Islands, and Samoa.

Hispanic - A person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.

White, Non-Hispanic - A person having origins in any of the original peoples of Europe, North Africa, or the Middle East (except those of Hispanic origin).

Racial/ethnic designations as used in this survey do not denote scientific definitions of anthropological origins. For the purpose of this report, a student may be included in the group to which he or she appears to belong, identifies with, or is regarded in the community as belonging. However, no person may be counted in more than one racial/ethnic group.

The manner of collecting the racial/ethnic information is left to the discretion of the institution provided that the system which is established results in reasonably accurate data. One acceptable method is a properly controlled system of post-enrollment self-identification by students. If a self-identification method is utilized, a verification procedure to ascertain the completeness and accuracy of student submissions should also be employed where feasible. In order to provide reasonably accurate data, the institution may require students to complete a questionnaire and/or identify themselves by name or otherwise when providing information. The fact that the information is being gathered in compliance with Title VI of the Civil Rights Act of 1964 and Title IX of the Education Amendments of 1972 may be disseminated in the manner and to the extent that the institution deems appropriate.

## Row Heading Instructions

1. Unduplicated Count of Student Enrollments in the Program During the Academic Year - To obtain the unduplicated headcount for each program, use the most recent statement of each student's program objective or intention. Students who have not been admitted into a limited access program should be included on the special Undecided form along with those students who have not selected a program.

   1A. Cooperative Students (Unduplicated) - Include in this section unduplicated enrollments of students reported in row 1 in a program of vocational education who, by written (and on file) cooperative arrangements between the school and employers, are employed and receive compensation, and receive instruction, including required academic courses and related vocational instruction by alternation of study in school with a job in any occupational field. However, these two experiences must be planned and supervised by the school and employers so that each contributes to the person's education and his or her employability. Work periods and school attendance may be on alternate half days, full days, weeks, or other periods of time in fulfilling the cooperative program.

2. Number of Students Who Completed the Requirements to Earn a Degree or Certificate During the Academic Year - "Completed the Requirements" means a student finished a planned sequence of courses, services, or activities designed to meet either a vocational occupational objective and obtained entry-level job skills or a program designed for transfer (university parallel).

## Remaining Columns

Number of the Total Who Are High School Students - Refers to persons declared by the institution to be at the 11th- and 12th-grade levels who are enrolled in vocational preparatory programs for which credit is given toward a high school diploma.

Special Needs - Report in this Section counts of persons in columns one through twelve who can be identified as handicapped, of limited English proficiency or disadvantaged (economically or academically) using the definitions below WHETHER OR NOT SPECIAL SUPPORT SERVICES ARE BEING PROVIDED BY VEA (Vocational Education Act) FUNDS TO SUCCEED IN THE VOCATIONAL EDUCATIONAL PROGRAM. A person should be reported in each category for which he or she has a special need. If a person has all three special needs, he or she is reported once in each category.

## Definitions

Handicapped - Refers to a person who has a physical or mental impairment.

Limited English Proficiency - refers to any member of a national origin minority who does not speak and understand the English language in an instructional setting well enough to benefit from vocational studies to the same extent as a student whose primary language is English. Some examples of national origin minorities are persons of Spanish, Chinese, or Italian heritage. The chief administrative official shall determine the method and the staff persons responsible for making the identification. Operationally, for example, enrollment in English as a second language could be used as a proxy here.

Disadvantaged - means persons (other than handicapped) who meet the following definitions:

"Economically disadvantaged" refers to any of the following:

(1) Family income is at or below national poverty level,
(2) Participant or parent(s) or guardian of the participant is unemployed,
(3) Participant or parent of participant is recipient of public assistance, or
(4) Participant is institutionalized or under State guardianship.

Operationally, economic disadvantage can be determined by reporting students who are participating in BEOG's or similar financial aid or work-study program.

"Academically disadvantaged" refers to persons who:

(1) Lack reading or writing skills,
(2) Lack mathematicall skills, or
(3) Perform below grade level.

Operationally, academic disadvantage can be determined by reporting students enrolled in remedial instruction or on academic probation.

NOTE: While it is not necessary to identify program leavers on the AA-1A, it will be necessary to conduct follow-up on leavers as part of the AA-2 and AA-4 requirements. Therefore, provisions should be made to identify leavers as they are defined in the AA-2 instructions in Section 16.

DIVISION OF COMMUNITY COLLEGES
PROGRAM ENROLLMENTS AND TERMINATIONS

ACADEMIC YEAR:_________

Program (ICS) Code:______________________________
Program Title:________________________________
New Program:_________________________________
College:____________________________________
Campus:_____________________________________
CORRECTION:___________

| Occupational Program Type: | Program Length: | Completion Award Type: |
|---|---|---|
| ____ Post-Secondary Technical<br>____ Post-Secondary Skilled/Semi-skilled | ____ Semester Credit Hours<br>____ Clock Hours | ____Associate in Arts<br>____Associate in Science<br>____Technical Certificate<br>____Associate of Applied Science<br>____Certificate of Applied Science<br>____Certificate of Training |

14.8

| Data Categories | Non-Resident Alien | | Asian or Pacific Islander | | American Indian or Alaskan Native | | Black (Not of Hispanic Origin) | | Hispanic | | White (Not of Hispanic Origin) | | TOTAL | Number of the total who are high school students | SPECIAL NEEDS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | | | Handi-capped | Limited English pro-ficiency | Disad-vantaged |
| 1. Unduplicated count of students enrolled in the program during the academic year. | | | | | | | | | | | | | | | | | |
| 1A. Of the above, the number who are cooperative students | ▨ | ▨ | ▨ | ▨ | ▨ | ▨ | ▨ | ▨ | ▨ | ▨ | ▨ | ▨ | | ▨ | ▨ | ▨ | ▨ |
| 2. Number of students who completed requirements to earn a degree or certificate during the academic year | | | | | | | | | | | | | | | | | |

AA-1A

Prepared by:________________________________

Date:______________________________

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
An equal opportunity employer

## DIVISION OF COMMUNITY COLLEGES

## UNDECIDED ENROLLMENTS

Academic Year: ____________

Program Title: UNDECIDED

College: ____________

NOTE: THIS PART OF THE REPORT INCLUDES ONLY THOSE STUDENTS WHO HAVE NOT REPORTED A PROGRAM OF STUDY OR HAVE NOT BEEN ADMITTED TO A LIMITED ACCESS PROGRAM.
DO NOT INCLUDE A.A. DEGREE STUDENTS. STUDENTS WAITING TO ENTER A LIMITED ACCESS PROGRAM WILL BE PLACED IN THE APPROPRIATE VOCATIONAL CATEGORY.

14.9

| Data Categories | Non-Resident Alien | | Asian or Pacific Islander | | American Indian or Alaskan Native | | Black (Not of Hispanic Origin) | | Hispanic | | White (Not of Hispanic Origin) | | TOTAL | Number of the Total Who Are High School Students | SPECIAL NEEDS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | | | Handi-capped | Limited English Proficiency | Disad-vantaged |
| 1. Undecided | | | | | | | | | | | | | | | ▨ | ▨ | ▨ |
| 1.99 Undecided | | | | | | | | | | | | | | | ▨ | ▨ | ▨ |
| 2. Students Waiting to Enter a Limited Access Program | ▨ | ▨ | ▨ | ▨ | ▨ | ▨ | ▨ | ▨ | ▨ | ▨ | ▨ | ▨ | ▨ | ▨ | ▨ | ▨ | ▨ |
| 1.21 Agriculture | | | | | | | | | | | | | | | | | |
| 1.22 Distribution | | | | | | | | | | | | | | | | | |
| 1.23 Health | | | | | | | | | | | | | | | | | |
| 1.24 Home Economics | | | | | | | | | | | | | | | | | |
| 1.25 Office Occupations | | | | | | | | | | | | | | | | | |
| 1.26 Trade & Industrial | | | | | | | | | | | | | | | | | |
| 1.27 Public Service | | | | | | | | | | | | | | | | | |

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President's Signature: ____________ Prepared by: ____________ Date Prepared: ____________

# Supplemental and Apprenticeship
# Course Enrollments
# AA-1C

## Purpose of the Report

This report is used by the Division of Community Colleges to meet VEDS reporting requirements relative to apprenticeship enrollments. The data is also entered into the Community College Management Information System so that it can be used along with other occupational enrollment data to respond to specific requests.

## Instructions and Definitions

Course Categories - These are the same categories used for occupational programs in the Community College Information Classification Structure. In this report relate each course to the appropriate category.

Supplemental Course Enrollment - Enter the number of students who enrolled in courses that were organized for the purpose of upgrading persons who are currently, or who have been previously, employed in the occupational field. Students enrolled in more than one course category will be reported as an enrollment in each.

Apprenticeship Course Enrollment - Enter the number of students who have enrolled in a course providing occupational preparation for skilled trades as authorized by State and Federal legislation and usually conducted under the auspices of a joint apprenticeship committee representing labor, management, and the school.

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# DIVISION OF COMMUNITY COLLEGES

## SUPPLEMENTAL
## and
## APPRENTICESHIP
## COURSES ENROLLMENT
## (ANNUAL)

ACADEMIC YEAR: ______________________ COLLEGE: ______________________

| ICS CODE | COURSE CATEGORY | Enrollment in Supplemental Courses | | Enrollment in Apprenticeship Courses | |
|---|---|---|---|---|---|
| | | Female | Male | Female | Male |
| | **AGRICULTURE** | | | | |
| 1.21.0100 | Agriculture Production | | | | |
| 1.21.0200 | Agricultural Supplies/Services | | | | |
| 1.21.0300 | Agricultural Mechanics | | | | |
| 1.21.0400 | Agricultural Products | | | | |
| 1.21.0500 | Ornamental Horticulture | | | | |
| 1.21.0600 | Agricultural Resources | | | | |
| 1.21.0700 | Forestry | | | | |
| 1.21.9900 | Other Agriculture | | | | |
| | TOTAL AGRICULTURE | | | | |
| | **DISTRIBUTIVE** | | | | |
| 1.22.0100 | Advertising Services | | | | |
| 1.22.0200 | Apparel and Accessories | | | | |
| 1.22.0300 | Automotive (Sales) | | | | |
| 1.22.0400 | Finance and Credit | | | | |
| 1.22.0500 | Floristry | | | | |
| 1.22.0600 | Food Distribution | | | | |
| 1.22.0700 | Food Services | | | | |
| 1.22.0800 | General Merchandise | | | | |
| 1.22.0900 | Hardware, Building Materials, Etc. | | | | |
| 1.22.1000 | Home Furnishings | | | | |
| 1.22.1100 | Hotel and Lodging | | | | |
| 1.22.1200 | Industrial Marketing | | | | |
| 1.22.1300 | Insurance | | | | |
| 1.22.1400 | International Trade | | | | |
| 1.22.1500 | Personal Services | | | | |
| 1.22.1600 | Petroleum | | | | |
| 1.22.1700 | Real Estate | | | | |
| 1.22.1800 | Recreational and Tourism | | | | |
| 1.22.1900 | Transportation | | | | |
| 1.22.2000 | Retail Trade | | | | |
| 1.22.3100 | Wholesale Trade | | | | |
| 1.22.9900 | Other Distributive | | | | |
| | TOTAL DISTRIBUTIVE | | | | |
| | **HEALTH** | | | | |
| 1.23.0100 | Dental | | | | |
| 1.23.0200 | Medical Laboratory Technology | | | | |
| 1.23.0301 | Associate Degree Nursing | | | | |
| 1.23.0302 | Practical (Vocational) Nursing | | | | |
| 1.23.0303 | Nursing Assistance (Aide) | | | | |
| 1.23.0304 | Psychiatric Aide | | | | |
| 1.23.0305 | Surgical Technician | | | | |
| 1.23.0306 | Obstetrical Technician | | | | |
| 1.23.0300 | Other Nursing | | | | |
| 1.23.0400 | Rehabilitation | | | | |
| 1.23.0500 | Radiologic | | | | |
| 1.23.0600 | Opthalmic | | | | |
| 1.23.0700 | Environmental Health | | | | |
| 1.23.0800 | Mental Health | | | | |
| 1.23.0900 | Miscellaneous Health Education | | | | |
| 1.23.9900 | Other Health Occupations | | | | |
| | TOTAL HEALTH | 240 | | | |

14.11

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Page 1 of 3

# SUPPLEMENTAL
# and
# APPRENTICESHIP
# COURSES ENROLLMENT
# (ANNUAL)

ACADEMIC YEAR: ______________________ COLLEGE: ______________________

| ICS CODE | COURSE CATEGORY | Enrollment in Supplemental Courses | | Enrollment in Apprenticeship Courses | |
|---|---|---|---|---|---|
| | | Female | Male | Female | Male |
| | **HOMEMAKING** | | | | |
| 1.24.0101 | Comprehensive Homemaking | | | | |
| 1.24.0102 | Child Development | | | | |
| 1.24.0103 | Clothing and Textiles | | | | |
| 1.24.0104 | Consumer Education | | | | |
| 1.24.0105 | Family Health | | | | |
| 1.24.0106 | Family Relations | | | | |
| 1.24.0107 | Foods and Nutrition | | | | |
| 1.24.0108 | Home Management | | | | |
| 1.24.0109 | Housing and Home Furnishings | | | | |
| 1.24.0100 | Other Homemaking | | | | |
| | **TOTAL HOMEMAKING** | | | | |
| | **OCCUPATIONAL PREPARATION** | | | | |
| 1.24.0201 | Care and Guidance of Children | | | | |
| 1.24.0202 | Clothing Mgt., Product. & Serv. | | | | |
| 1.24.0203 | Food Mgt., Product. & Services | | | | |
| 1.24.0204 | Home Furnishings, Equip. & Serv. | | | | |
| 1.24.0205 | Instit. & Home Mgt. & Serv. | | | | |
| 1.24.0200 | Other Occupational Preparation | | | | |
| | **TOTAL OCCUPATIONAL PREP.** | | | | |
| | **OFFICE** | | | | |
| 1.25.0100 | Accounting | | | | |
| 1.25.0200 | Business Data Proc. Systems | | | | |
| 1.25.0300 | Filing, Off.Mach., Clerical Occup. | | | | |
| 1.25.0400 | Information Communication | | | | |
| 1.25.0500 | Materials Support | | | | |
| 1.25.0600 | Personnel and Training | | | | |
| 1.25.0700 | Stenographic and Secretarial | | | | |
| 1.25.0800 | Supervisory and Admin. Mgt. | | | | |
| 1.25.0900 | Typing | | | | |
| | **TOTAL OFFICE** | | | | |
| | **TRADE & INDUSTRIAL** | | | | |
| 1.26.0100 | Air Cond. & Environ. Control | | | | |
| 1.26.0200 | Appliance Repair | | | | |
| 1.26.0300 | Automotive Services | | | | |
| 1.26.0400 | Aviation Occupations | | | | |
| 1.26.0500 | Blueprint Reading | | | | |
| 1.26.0600 | Business Machine Maintenance | | | | |
| 1.26.0700 | Commercial Art | | | | |
| 1.26.0800 | Commercial Fishery & Oceanographic | | | | |
| 1.26.0900 | Commercial Photography | | | | |
| 1.26.1001 | Carpentry | | | | |
| 1.26.1002 | Electricity | | | | |
| 1.26.1004 | Masonry | | | | |
| 1.26.1007 | Plumbing & Pipefitting | | | | |
| 1.26.1000 | Other Constr. & Main. Trades | | | | |
| 1.26.1100 | Custodial Services | | | | |
| 1.26.1200 | Diesel Mechanic | | | | |
| 1.26.1300 | Drafting and Design | | | | |
| 1.26.1400 | Electrical | | | | |
| 1.26.1500 | Electronics | | | | |

# SUPPLEMENTAL
# and
# APPRENTICESHIP
# COURSES ENROLLMENT
# (ANNUAL)

**ACADEMIC YEAR:** ____________________ **COLLEGE:** ____________________

| ICS CODE | COURSE CATEGORY | Enrollment in Supplemental Courses | | Enrollment in Apprenticeship Courses | |
|---|---|---|---|---|---|
| | | Female | Male | Female | Male |
| | **TRADE & INDUSTRIAL Cont.** | | | | |
| 1.26.1600 | Fabric Maintenance Services | | | | |
| 1.26.1700 | Foremanship Supvr. & Mgt. Devel. | | | | |
| 1.26.1900 | Graphic Arts | | | | |
| 1.26.2000 | Industrial Atomic Energy | | | | |
| 1.26.2100 | Instrument Maint. & Repair | | | | |
| 1.26.2200 | Maritime Occupations | | | | |
| 1.26.2300 | Metal Working | | | | |
| 1.26.2400 | Metallurgy | | | | |
| 1.26.2601 | Barbering | | | | |
| 1.26.2602 | Cosmetology | | | | |
| 1.26.2700 | Plastics Occupations | | | | |
| 1.26.2900 | Quantity Food | | | | |
| 1.26.3100 | Small Engine Repair | | | | |
| 1.26.3200 | Stationary Energy Sources | | | | |
| 1.26.3300 | Textile Production and Fabrication | | | | |
| 1.26.3400 | Leatherworking | | | | |
| 1.26.3500 | Upholstering | | | | |
| 1.26.9900 | Other Trade and Industrial | | | | |
| | | | | | |
| | **TOTAL TRADE & INDUSTRIAL** | | | | |
| | **PUBLIC SERVICE** | | | | |
| 1.27.0100 | Fire Science | | | | |
| 1.27.0200 | Law Enforcement | | | | |
| 1.27.0300 | Education (Teacher Aide) | | | | |
| 1.27.0400 | Library | | | | |
| 1.27.0500 | Audio-Visual (Multi-Media) | | | | |
| 1.27.0600 | Recreation | | | | |
| 1.27.0700 | Social Service Work | | | | |
| 1.27.0800 | Public Administration | | | | |
| 1.27.0900 | Urban, Rural & Comm. Devel. Ser. | | | | |
| 1.27.1000 | Resources Management Services | | | | |
| 1.27.9900 | Other Public Service | | | | |
| | **TOTAL PUBLIC SERVICE** | | | | |
| | **TOTAL SUPPLEMENTAL AND APPRENTICESHIP** | | | | |

**Prepared By:** ____________________

**President's Signature:** ____________________ **Date:** __________

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
an equal opportunity employer

# INSTRUCTIONS
# FOR
# SPECIAL SECTIONS REPORT
# AA-1D

## Purpose of the Report

The purpose of this report is to account for those students who are enrolled in the following types of programs:

(1) Special Vocational Programs

(2) Special Funded Vocational Programs

(3) Programs for Persons with Special Needs

(4) Programs of Special Legislative Purpose

## Instructions and Definitions

### SECTION 1 - ENROLLMENTS IN VOCATIONAL EDUCATION PROGRAMS

Column (b) - Enter total enrollments in the special program.

Column (c) - Enter number of female students enrolled. The number of male students will be the difference between the total and number of females.

Columns (d) and (e) - Enter enrollments for secondary and post-secondary levels. The sum of columns (d) and (e) MUST equal column (b). NOTE: Columns (f) through (j) are not applicable.

A. Secondary - High school youths in grades 7-12.

B. Post-secondary - Persons who have completed or left high school and who are enrolled in an organized program of study in preparation for entering the labor market.

### SECTION 2 - ENROLLMENTS IN SPECIAL FUNDED VOCATIONAL EDUCATION PROGRAMS, BY LEVEL

Report the number of students who were served in programs which received special funds. This is a duplication of enrollments reported on another AA-1 report; hence, the parentheses.

Columns (b) through (h) - Report the number of students in each column as applicable.

## SECTION 3 - ENROLLMENTS OF PERSONS WITH SPECIAL NEEDS BY LEVEL

Lines 1 and 2 - Break out the total number of students enrolled in all programs who are classified as disadvantaged or handicapped and received special services. This is duplication and does not equal the total.

A. Disadvantaged - Persons who have academic, socioeconomic, cultural, or other handicaps (excluding physical or mental) that prevent them from succeeding in regular vocational education or consumer and homemaking programs designed for persons without such handicaps and who, for that reason,required specially designed educational programs or related services.

B. Handicapped - Persons who are mentally retarded, hard of hearing, deaf, speech impaired, visually handicapped, seriously emotionally disturbed, crippled, or other health impaired persons who by reason of their handicap, cannot succeed in a regular vocational or consumer and homemaking program designed for persons without such handicaps and who, for that reason, require special educational assistance or a modified vocational or consumer homemaking education program.

Columns (b) through (j) - Report the number of students in each column as applicable.

## SECTION 4 - SPECIAL NEEDS ENROLLMENTS BY TYPE OF INSTRUCTIONAL SETTING

Report here data on students identified in the last three columns of the AA-1A. Report each student only once, by the type of instructional setting of the vocational education program in which he or she is enrolled by handicapped, disadvantaged (110 and 140 refer to sections of the law that provides the funding) and limited English proficiency. The instructional setting of the program should be indicated as Mainstream/no support, Mainstream/support (from VEA funds) or Separate.

Definitions:

Mainstream/No Support Program is one that is conducted in an integrated setting, i.e., students having special needs together with students not having special needs. A student having special needs should be reported in a mainstream/no support program if that student experiences full participation in a mainstream vocational education program where no additional VEA funds are provided to assist the student.

Mainstream/Support Program is one that is conducted in an integrated setting, i.e., students having special needs together with students not having special needs. A student having special needs should be reported in a mainstream/support program if that student experiences full participation in a mainstream vocational education program where ADDED SUPPORT SERVICES ARE PROVIDED BY VEA FUNDS TO ASSIST THE STUDENT.

Separate Program - refers to a program in which the person with special needs is enrolled at a regular school or separate institution in a vocational education program where the enrollment is limited to handicapped, disadvantaged or limited English proficiency persons. Also include vocational education program activities provided for these students in hospitals or at the student's home.

For mainstream/support and separate programs, report persons with special needs who meet the requirements under the law for the three special needs categories (handicapped, limited English proficiency and disadvantaged) who by reason thereof:

(1) Require and received special education assistance and related services and,
(2) Cannot succeed in the regular vocational education program without special educational assistance; or
(3) Require a modified vocational education program.

The term "special educational assistance" includes specially designed instruction, teachers' aides to support classroom or lab instruction, taped texts, interpreters or other effective methods of making orally delivered materials available to students, classroom equipment adapted for use by students with manual impairments, and other similar services and actions, as well as facility modifications.

The term "related services" includes transportation and such developmental, corrective and other support services as are required to assist a handicapped person to benefit from the vocational education program; such services include speech pathology and audiology, psychological services, physical and occupational therapy, recreation, counseling services, and medical services for diagnostic or evaluation purposes.

## SECTION 5 - ENROLLMENTS BY LEGISLATIVE PURPOSE

Report here data on enrollments on the AA-1A by legislative purpose. ONLY SPECIAL SERVICES BEING PROVIDED UNDER THE STATE PLAN are to be reported here. Report here the number of students benefitting from the specified Section 120, 130, and 150 expenditures for work-study, support services for women, day care services, and vocational education for displaced homemakers.

Definitions:

Vocational Education Work-Study may be furnished to a student who has been accepted or is enrolled full-time and is in good standing in an approved vocational education program; is in need of the earnings to begin or continue his or her vocational program; is at least 15 years of age and less than 21 years of age at the onset of employment, and can maintain good standing in school while employed; is employed for no more than 20 hours in any school week; is paid no more than the prevailing rate for similar duties; and is employed by a public or nonprofit private agency or institution.

Support Services for Women who enter vocational education programs designed to prepare individuals for employment in jobs which have been traditionally limited to men including counseling, job development, and job follow-up support to overcome the barriers which women face in working in non-traditional areas.

Day-Care Services shall be for the purpose of providing appropriate care and protection of infants, preschool and school-age children in order to afford students who are parents the opportunity to participate in vocational education programs. Such day-care services shall be governed by the Federal Interagency Day Care Requirements (45 CFR Part 71).

Vocational Education Programs for Displaced Homemakers and Other Special Groups can be funded to assess and meet the needs of these special groups. The programs shall include organized educational programs to prepare these persons for employment, special courses preparing these individuals in how to seek employment, and the provision of placement services for the graduates of these programs.

Page 1 of 2

### DIVISION OF COMMUNITY COLLEGES

### SPECIAL SECTIONS REPORT

College: ____________________

Academic Year: ____________________

Prepared by: ____________________

## SECTION 1 - ENROLLMENTS IN VOCATIONAL EDUCATION PROGRAMS

| PROGRAMS (a) | TOTAL (b) | FEMALE (c) | SECONDARY (d) | POST SECONDARY (e) | ADULT | | | COOPERATIVE (i) | COMPLETIONS (j) |
|---|---|---|---|---|---|---|---|---|---|
| | | | | | PREPARATORY (f) | SUPPLEMENTAL (g) | APPRENTICESHIP (h) | | |
| 99.0302 Individual Manpower Train. Sys. (IMTS) | | | | | ▨ | ▨ | ▨ | ▨ | ▨ |

## SECTION 2 - ENROLLMENTS IN SPECIAL FUNDED VOCATIONAL EDUCATION PROGRAMS, BY LEVEL

14.18

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Comprehensive Employ. Training Act (CETA) | ( ) | ( ) | ( ) | ( ) | ( ) | ( ) | ( ) | ▨ | ▨ |
| Migrant Education (Federal, State) | ( ) | ( ) | ( ) | ( ) | ( ) | ( ) | ▨ | ▨ | ▨ |

## SECTION 3 - ENROLLMENTS OF PERSON WITH SPECIAL NEEDS, BY LEVEL

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Disadvantaged | ( ) | ( ) | ( ) | ( ) | ( ) | ( ) | ( ) | ( ) | ( ) |
| Handicapped | ( ) | ( ) | ( ) | ( ) | ( ) | ( ) | ( ) | ( ) | ( ) |

AA-1D

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
an equal opportunity employer

Page 2 Of 2

## DIVISION OF COMMUNITY COLLEGES
## SPECIAL SECTIONS REPORT

### SECTION IV - Special Needs Enrollments by Type of Instructional Setting

| Type of Setting | Handicapped | Disadvantaged 110 | Disadvantaged 140 | LEP |
|---|---|---|---|---|
| Mainstream/No Support | | ▨ | ▨ | ▨ |
| Mainstream/Support | | | | |
| Separate | | | | |
| TOTAL | | ▨ | ▨ | ▨ |

### SECTION V - Enrollments by Legislative Purpose

| Participants by Legislative Purpose | TOTAL |
|---|---|
| Work Study (Include only programs provided for by vocational funding) | |
| Support Services for Women | |
| Day-Care Services | |
| Vocational Education for Displaced Homemakers | |

AA-1D

Return to: Bureau of Research and Information Systems
Division of Community Colleges
Department of Education
Tallahassee, Florida 32301

## DIVISION OF COMMUNITY COLLEGES

## ANNUAL ENROLLMENT REPORT
## FIRST-TIME-IN-COLLEGE
## EARLY EXIT, G.E.D. STUDENTS

**ACADEMIC YEAR:** ______________________ **COLLEGE:** ______________________

### INSTRUCTIONS

Enter the headcount of the total number of first-time-in-college early exit G.E.D. students who are enrolled in programs leading to a degree, certificate or other formal award.

### DEFINITIONS

First-Time-In-College - a student who has not attended any college prior to the current academic year.

Early Exit G.E.D. - a student who completed high school *early* by taking and passing the General Educational Development (GED) Tests. Students who legally have dropped out of high school or who are entering from an adult high school program *are not to be included.*

Programs Leading to a Degree, Certificate or Other Formal Award - a student who is enrolled *only* in a program leading to a degree, certificate or other formal award. Do not include students enrolled in Community Instructional Services or Recreational and Leisure Time programs.

Total enrollment headcount of first-time-in-college early exit GED students: ☐

Prepared By: ______________________

President's Signature: ______________________ Date: ______________________

Return to: Bureau of Research and Information Systems
Division of Community Colleges
Tallahassee, Florida 32301

**State of Florida**
**Department of Education**
**Tallahassee, Florida**
**Ralph D. Turlington, Commissioner**
**An equal opportunity employer**

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AA–1E

# INSTRUCTIONS
# FOR
# ANNUAL REPORT OF DEVELOPMENTAL
# AND
# COMMUNITY INSTRUCTIONAL SERVICE ENROLLMENT
# (EA-3)

## Purpose of the Report

The EA-3 Report provides the annual enrollment headcount of two different groups of students. The first group represents those students enrolled in a Developmental and Community Instructional Services program. The second group represents those students who have no intent to complete a curricular program offered by the college, but are taking credit courses to satisfy their personal objectives. Further instructions are provided on the EA-3 report form. See page 14.22.

## DIVISION OF COMMUNITY COLLEGES

## ANNUAL REPORT OF DEVELOPMENTAL and COMMUNITY INSTRUCTIONAL SERVICE ENROLLMENT

**ACADEMIC YEAR:** ______________________ **COLLEGE:** ______________________________

| CLUSTERS | (1) Number of ALL Students Served | (2) Unduplicated Headcount |
|---|---|---|
| *DEVELOPMENTAL (1.30)*<br>1.31 Compensatory | | |
| 1.32 Adult Elementary & Secondary | | |
| *COMMUNITY INSTRUCTIONAL SERVICE (1.40)*<br>1.41 Citizenship | | |
| 1.42 Recreational and Leisure Time | | |

INSTRUCTIONS

(1) *NUMBER OF ALL STUDENTS SERVED* - Enter the number of students enrolled in each of the program clusters. This number represents the *total* number of people served by each cluster.

(2) *UNDUPLICATED HEADCOUNT* - Enter the unduplicated headcount of students, counting each student in ONLY one program cluster. DO NOT include students that have been counted in either Advanced and Professional or Occupational categories.

## OTHER PERSONAL OBJECTIVES ENROLLMENT

| | HEADCOUNT |
|---|---|
| Enter the number of *students* who do not intend to complete a curricular program offered by the college, but who are taking *credit* courses to satisfy their personal objectives. An example would be a teacher taking a course to be used for renewal of certificate, in which case the teacher is not seeking to complete degree or certificate requirements. | |

Prepared by: ______________________________

President's Signature: ______________________________ Date: ____________________

EA-3

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
An equal opportunity employer

14.22

# SECTION 15

## DIVISION OF COMMUNITY COLLEGES
## NCES 2404-1 TEACHER-STAFF REPORT
## (VEDS)

### Instructions and Definitions

### Introduction

NCES 2404-1 reports data on staff assignments in vocational education. It provides data on all instructional staff by occupational program assignment, Consumer and Homemaking, Industrial Arts, and program support and supervisory staff covered by the STATE PLAN FOR VOCATIONAL EDUCATION.

The Teacher-Staff Report contains three sections. Section I is a total of all the staff involved in vocational education programs during the reporting period. These data show unduplicated headcounts by total and by female. Section II is the unduplicated headcount broken out by racial and ethnic designation of full-time staff reported in Section I and Section III is an unduplicated headcount of part-time staff assigned to Vocational core courses.

Instructional staff assignments to programs of less than 500 contact hours duration ARE to be included. Non-vocational teacher effort should not be reported here. For example, if a student must take math, do not report the effort of the math teacher UNLESS the math course is an integral part of an occupational preparation curriculum and the curriculum cannot be understood without the math knowledge.

### Instructions and Definitions for NCES 2404-1

Sections I and II contain unduplicated headcounts. An UNDUPLICATED COUNT reports an individual once only regardless of the number of programs assigned to that person during the reporting year. Persons who teach and also have supervisory assignments shall be reported once and once only on the form. Report the persons in the assignments with the most clock hours. For example, a chairperson of a health occupations program at a vocational college may teach a course 20 percent of the time and supervise the health occupations instructors 80 percent of the time. This person would be counted only in the Program/Supervisory row for Sections I and II. If the instructional and supervisory assignments are equal in clock hours, then report the person as instructional staff in the appropriate instructional program.

| | |
|---|---|
| SECTION 1<br>(Page 1) | Provide an unduplicated count of all full-time instructional staff, program support staff, and program supervisory staff who were employed during the reporting year (regardless of the duration of that employment), by total and by female. There are 12 categories under Occupational Preparation program assignment. The two-digit OE code is used for each program area, and all six-digit program assignments are to be collapsed and reported under the two-digit OE code. If an instructional staff person is not assignable to a two-digit program area, classify that person in the "Other NEC" (Not Elsewhere Classified) category. |

If a staff person has both supervisory and instructional assignments, report the person once only against the assignment with the most clock hours. If, however, the supervisory assignment does not relate directly to the supervision of vocational education programs--as, for example, in the case of a teaching vice-principal whose time is equally divided between teaching and supervision--then report the person as a teacher.

Definitions:

An Unduplicated Count means all staff shall be reported once and only once in Section I and once in Section II. Instructional staff with dual or multuple program assignments shall be reported in the program where the most clock hours of instruction are provided during the reporting year. For example, a person teaching in a welding program 30 percent of his or her time, and in an agriculture mechanics program 70 percent of his or her time, is reported ONCE in 01.00, Agriculture, and is reported NOWHERE else in these two sections.

Program Assignments refers to assignments of all staff to instructional programs designed for occupational preparation. All such assignments are reported by two-digit OE code. If instructional staff are assigned to a program not classifiable in any of the program areas, report those persons in 99.00, "Other NEC" (Not Elsewhere Classified). For example, a co-op coordinator assigned students in horticulture, distributive education, and auto mechanics is reported in "Other NCE" (99.00).

Instructional Staff refers to individuals employed for the primary purpose of performing instructional activities in vocational education. There are three categories of instructional staff to be reported:

(1) Occupational Preparation Staff are persons who impart competencies to students that prepare them for employment (paid or unpaid) in specific occupational fields such as Agriculture, Health Occupations, Distributive Education, and Office Occupations. REPORT ONLY THOSE PERSONS WHO ARE REPORTED IN THE STATE PLAN.

(2) Consumer and Homemaking Staff refers to those teachers of instructional programs that prepare students for the occupation of homemaking. REPORT ONLY THOSE PERSONS WHO ARE REPORTED IN THE STATE PLAN.

(3) Industrial Arts Staff refers to teachers of programs that, among other areas, assist individuals in making informed and meaningful occupational choices to prepare them for entry into advanced trade and industrial or technical education programs. REPORT ONLY THOSE PERSONS WHO ARE REPORTED IN THE STATE PLAN.

Program/Support refers to individuals employed for the primary purpose of assuring that students benefit from their vocational education programs. Included in this group are all staff who provide instructional support services to teachers or instructors of vocational education programs such as teachers' aides, remedial teachers, signers (interpreters for deaf students), and other such staff.

Administration/Supervisory refers to personnel other than teachers who are assigned responsibilities directly relating to the supervision of vocational education programs for one or more of the program areas listed on the form. Include occupational deans, vocational directors, program supervisors, department heads, and other such staff. Do not include presidents, vice presidents, general administrative staff or guidance counselors.

| | |
|---|---|
| SECTION II<br>(page 1) | Report here the total unduplicated head count, by self-identified racial/ethnic designation, all persons reported in Section I. This section includes instructional staff, support staff, and supervisory staff. If a person refuses to identify his or her race or ethnicity, use instructional identification. |

Definitions:

Racial/ethnic categories are as follows:

American Indian or Alaskan Native - A person having origins in any of the original peoples of North America, or who maintains cultural identification through tribal affiliation or community recognition.

Asian American or Pacific Islander - A person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or Pacific Islands. This includes, for example, China, Japan, Korea, the Philippine Islands, Samoa, India, and Vietnam.

Black, not of Hispanic Origin - A person having origins in any of the black racial groups of Africa (excluding Hispanics).

Hispanic - A person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.

White, not of Hispanic Origin - A person having origins in any of the original peoples of Europe, North Africa, or the Middle East (excluding Hispanics).

| | |
|---|---|
| SECTION III | Report all part-time staff assignment by two-digit OE code using the same unduplicating and assignment rules utilized in the previous part. |

DIVISION OF COMMUNITY COLLEGES

REPORTING PERIOD:____________________ TEACHER-STAFF REPORT COLLEGE:____________________________

15.4

| OCCUPATIONAL PREPARATION Program Assignment |  | SECTION I Total Staff Unduplicated Head Count |  | SECTION II Total Staff (Unduplicated Head County) Racial/Ethnic Designation |  |  |  |  | SECTION III |
|---|---|---|---|---|---|---|---|---|---|
| USOE | ICS | Total | Female | American Indian/ Alaskan Native | Asian or Pacific Islander | Black Not Hispanic | Hispanic | White Not Hispanic | Part-Time |
| Instruction Staff |  |  |  |  |  |  |  |  |  |
| 01.00 Agriculture | 1.21 |  |  |  |  |  |  |  |  |
| 04.00 Distribution | 1.22 |  |  |  |  |  |  |  |  |
| 07.00 Health | 1.23 |  |  |  |  |  |  |  |  |
| 09.02 Occupational Home Economics | 1.2402 |  |  |  |  |  |  |  |  |
| 14.00 Office Occupations | 1.25 |  |  |  |  |  |  |  |  |
| 16.00 Technical | 1.27 |  |  |  |  |  |  |  |  |
| 17.00 Trade & Industrial | 1.26 |  |  |  |  |  |  |  |  |
| 99.00 Other NEC |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
| 09.01 Consumer & Homemaking |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
| 10.00 Industrial Arts |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
| Other Staff |  |  |  |  |  |  |  |  |  |
| Administration/Supervisory |  |  |  |  |  |  |  |  |  |
| Program/Support |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
| Totals (Unduplicated) |  |  |  |  |  |  |  |  |  |

NCES Form 2404-1

Prepared by:________________________________

Date:____________________

Return To: Bureau of Research & Information Systems
Division of Community Colleges
Department of Education
Tallahassee, Florida 32301

# SECTION 16

## PLACEMENT AND FOLLOW-UP PROGRAM REPORTS

## AA-2, AA-3, AA-4, AA-5

### Purpose of the Reports

The purpose of these reports is to provide placement and follow-up information on each program offered by the college. Therefore, separate report forms should be prepared for each program. The information collected is used by the Division of Community Colleges to prepare reports for the Division of Vocational Education and the Legislature, to provide employment supply data for the manpower studies conducted by the Department of Commerce and other State agencies, to prepare Federal reports for each college, and to monitor the State plan for equal access and equal opportunity.

### General Definitions

The AA-2 report deals with the PLACEMENT of student completers and leavers (see page 16.3). This is a report of the placement of these students who terminated the program in the prior academic year either by completing the program or by leaving the program. The AA-2 involves the same cohort of students that were reported on the AA-1A Program Enrollments and Terminations report on line 2 (completers). Thus, line 1G on the AA-2 must contain the same number of students as are reported on line 2 of the AA-1A report when reporting completers. Reporting is on an annual basis for each program (see instructions on Sampling). NOTE: The requirement for follow-up on program leavers applies only to occupational programs.

The AA-3 report deals with the FOLLOW-UP of students who completed degree and certificate programs and those who left the program prior to normal completion. The purpose of FOLLOW-UP is to collect information from the students and employers which can be used to evaluate the success of a program in achieving its objectives and provide a basis for making appropriate changes and updates to the program. The information identifies the number of students included in the Follow-Up studies. The findings, conclusions, and uses of the studies are summarized in the AA-3 report. This information (AA-3) is reported only for years in which follow-up and/or withdrawal studies are conducted.

Students To Be Included in the Follow-Up Studies - This includes either all of the students who completed the program or a reasonable sample thereof. It is very important to note that the Follow-Up Studies do not relate to any particular academic year or time frame, but may include students from several different years. The numbers reported in this part of the study simply show the number of students included in the studies. The conclusions and findings are included in the AA-3B report.

Students To Be Included in the Withdrawal Studies - This includes either all of the students who withdrew from a program or a reasonable sample thereof. The Withdrawal Studies do not relate to any particular academic year but may include withdrawals from a number of different years. The numbers reported reflect the students studied and the results of the study. For the purpose of this report a withdrawal is defined in the same manner as a leaver is defined for the AA-2 (see page 16.3).

Sampling - It is possible to sample the student placement survey if the number of completions in any one column is sufficiently large to allow the drawing of a random sample. One should use a sample size large enough to support a confidence level of .95 and a precision of .05 (see the schedule on page 16.5 for proper sample size). Even though sampling is used, one should report according to the estimated population distribution rather than the absolute sampling results.

Reporting By Campus - Colleges with more than one campus may report by campus or on a college-wide basis. However, it is necessary that the AA-1A and the AA-2 reports be done on the same basis so that enrollments, completions, and placements from the two reports can be matched.

Due Date of Reports - The AA-2 and AA-3A reports are due in the office of the Division of Community Colleges according to the schedule indicated on the Chart of reports in Section 1.

## Instructions for Completing the AA-2 Placement and Non-Returning Students Report

Separate forms should be submitted for completers and leavers. Check the appropriate line in the top part of the form to identify which type student the report represents. The following definitions are those data categories on the left hand margin of the report:

1. PLACEMENT

   This section of the report includes placement data for all students who completed the program during the prior academic year and were reported in Item 2 of the AA-1A report or who left the program prior to completion. We are, therefore, following up on the placement of a particular cohort of students. The following are the specific data categories:

   A. Employed full-time in field trained or related field - This means that the student who completed the program is employed full-time in the field for which he/she was trained or a closely related field.

      A1. Total - Total number of students for each column.

      A2. Military only - The number of students in full-time military service for each column.

   B. Other Employment (not related field). - This includes students who are employed full-time but not in the field for which they were trained by the program. It includes those persons who completed the General Degree Transfer (A.A.) program, are employed full-time, and are not continuing their education.

      B1. Total - Total number of students for each column.

      B2. Military only - The number of students in full-time military service for each column.

   C. Continuing their education - This includes those students continuing their education.

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D. Unemployed - Seeking Employment (work) - These are persons seeking employment but are currently unemployed who are not continuing their education.

E. Not in Labor Force - These are persons who are not seeking employment and not continuing their education for such reasons as death, illness, or by choice.

F. Placement Status Unknown - These are the students who cannot be located to determine their placement status.

G. Total - (same as Item 2 when reporting completers) - This is the total of those students who completed the program and were reported on Item 2 on the Program Enrollments and Terminations Report or who left the program prior to completion. It is also the total of Items A through F of this report for each column. These cross-checks should be made prior to submitting the report.

### Special Needs Section

The last three columns refer to the Placement Status of those persons identified on the AA-1A as Handicapped, Limited English Proficiency or Disadvantaged. The totals on line 1G should match the totals on line 2 of the AA-1A for these columns when reporting on completers.

Leavers - For the purpose of the AA-2 and AA-4 reports the term leavers is defined as a former student "...who did not complete the program and did not return to enroll in the institution for two consecutive semesters... or who notified the institution of intent not to enroll again in that institution prior to program completion." (NCES 2404-5 and 2404A-7, Page 3) Operationally, leavers are obtained as follows:

Remove completers from the universe of all enrollments on the AA-1A. This gives potential leavers. From this group of potential leavers, remove any who are enrolled in the current year's Fall or Winter semester. Those remaining are the true leavers and constitute the leaver follow-up universe. They include those who transferred to another school or between an A & P and vocational program. Thus the leaver universe cannot be identified until after Winter registration of the year following the year in which they were counted as an enrollment.

Program Code: ______________________

Program Title: ______________________

Campus: ______________________

Year Covered: ______________________

PLACEMENT AND FOLLOW-UP REPORT

Placement and Follow-Up

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
Affirmative action/equal opportunity employer

College: ______________________

Prepared by: ______________________

Date Prepared: ______________________

| Occupational Program Type: | Program Length: | Completion Award Type: | Completion Award Type: | |
|---|---|---|---|---|
| ____ Post-Secondary Technical<br>____ Post-Secondary Skilled/ Semi-skilled | ____ Semester Credit Hours<br>____ Clock Hours | ____ Associate in Arts<br>____ Associate in Science<br>____ Technical Certificate | ____ Associate in Applied Science<br>____ Certificate of Applied Science<br>____ Certificate of Training | ____ Completers<br>____ Leavers |

| Data Categories | Non-Resident Alien | | Asian or Pacific Islander | | American Indian or Alaskan Native | | Black (Not of Hispanic Origin) | | Hispanic | | White (Not of Hispanic Origin) | | TOTALS | SPECIAL NEEDS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | | Handi-capped | Limited English Proficiency | Disad-vantaged |
| I. PLACEMENT<br>A. Employed in related field<br>A1. Total | | | | | | | | | | | | | | | | |
| A2. Military Only | | | | | | | | | | | | | | | | |
| B. Other employment (Not in related field and not pursuing educa.)<br>B1. Total | | | | | | | | | | | | | | | | |
| B2. Military Only | | | | | | | | | | | | | | | | |
| C. Continuing Education | | | | | | | | | | | | | | | | |
| D. Unemployed-Seeking employment (work) and not pursing education | | | | | | | | | | | | | | | | |
| E. Not in Labor Force and not pursuing additional education | | | | | | | | | | | | | | | | |
| F. Placement status unknown | | | | | | | | | | | | | | | | |
| G. Total | | | | | | | | | | | | | | | | |

16.4

AA-2

## TABLE OF MINIMUM SAMPLE SIZES

CONFIDENCE = 0.950 PRECISION = 0.050 NO. OF ITEMS = 1

| POP. | N | POP. | N | POP. | N. | POP. | N. |
|---|---|---|---|---|---|---|---|
| 1 | 1 | 36 | 33 | 210 | 136 | 800 | 260 |
| 2 | 2 | 37 | 34 | 220 | 140 | 850 | 265 |
| 3 | 3 | 38 | 35 | 230 | 144 | 900 | 270 |
| 4 | 4 | 39 | 36 | 240 | 148 | 950 | 274 |
| 5 | 5 | 40 | 37 | 250 | 152 | 1000 | 278 |
| 6 | 6 | 41 | 38 | 260 | 156 | 1100 | 285 |
| 7 | 7 | 42 | 38 | 270 | 159 | 1200 | 292 |
| 8 | 8 | 43 | 39 | 280 | 162 | 1300 | 297 |
| 9 | 9 | 44 | 40 | 290 | 166 | 1400 | 302 |
| 10 | 10 | 45 | 41 | 300 | 169 | 1500 | 306 |
| 11 | 11 | 46 | 42 | 310 | 172 | 1600 | 310 |
| 12 | 12 | 47 | 42 | 320 | 175 | 1700 | 314 |
| 13 | 13 | 48 | 43 | 330 | 178 | 1800 | 317 |
| 14 | 14 | 49 | 44 | 340 | 181 | 1900 | 320 |
| 15 | 15 | 50 | 45 | 350 | 184 | 2000 | 323 |
| 16 | 16 | 55 | 49 | 360 | 186 | 2500 | 334 |
| 17 | 17 | 60 | 52 | 370 | 189 | 3000 | 341 |
| 18 | 18 | 65 | 56 | 380 | 192 | 3500 | 347 |
| 19 | 19 | 70 | 60 | 390 | 194 | 4000 | 351 |
| 20 | 20 | 75 | 63 | 400 | 197 | 4500 | 355 |
| 21 | 21 | 80 | 67 | 410 | 199 | 5000 | 357 |
| 22 | 21 | 85 | 70 | 420 | 201 | 6000 | 362 |
| 23 | 22 | 90 | 73 | 430 | 203 | 7000 | 365 |
| 24 | 23 | 95 | 77 | 440 | 206 | 8000 | 367 |
| 25 | 24 | 100 | 80 | 450 | 208 | 9000 | 369 |
| 26 | 25 | 110 | 86 | 460 | 210 | 10000 | 371 |
| 27 | 26 | 120 | 92 | 470 | 212 | 20000 | 378 |
| 28 | 27 | 130 | 98 | 480 | 214 | 30000 | 380 |
| 29 | 27 | 140 | 103 | 490 | 216 | 40000 | 381 |
| 30 | 28 | 150 | 108 | 500 | 218 | 50000 | 382 |
| 31 | 29 | 160 | 113 | 550 | 227 | 100000 | 383 |
| 32 | 30 | 170 | 118 | 600 | 235 | 150000 | 384 |
| 33 | 31 | 180 | 123 | 650 | 242 | 200000 | 384 |
| 34 | 32 | 190 | 128 | 700 | 249 | 250000 | 384 |
| 35 | 33 | 200 | 132 | 750 | 255 | 300000 | 384 |

FOR INFINITE POPULATION, N = 385

## Instructions for Completing the AA-3A Follow-Up and Withdrawal Studies

The following definitions are those data categories on the left hand margin of the report:

1. FOLLOW-UP STUDIES

    A. Number of Students - If a follow-up study was conducted for this program during the academic year, report the number of students who were followed-up. It is important to note that this part of the report is completed only when a follow-up study is conducted during the academic year being reported.

2. WITHDRAWAL STUDIES

    A. Number of students contacted through interviews or responding to a questionnaire - Report the total number of students who responded or were contacted if a withdrawal study was conducted for this program during the academic year being reported. The sums of Items B, C, and D below should be equal to or less than A. It is important to note that this part of the report is not completed unless a withdrawal study was conducted and completed during the time frame covered by this report.

    B. Students planning to return - This is the number of students who have temporarily "stopped-out" of college but plan to return at a later date to continue their education (any college).

    C. Students who feel they have achieved their educational goal prior to completing the program - This is the number of students who feel that they have achieved their educational goal and have entered the labor market.

    D. Students not attaining their educational goal and not planning to continue their education - These are students who dropped out of the college without achieving their educational goal.

## Instructions for Completing the AA-3B Program Evaluation Report

The Program Evaluation Report should be filled out by the program manager. (This is the person under whose immediate direction the program is being conducted.)

Part I consists of two sections, A and B. Section A is to be filled out by program managers both in the vocational area as well as in the transfer program. Section A asks program managers to assess the degree to which program entry communication and computation competencies have been defined and measured at the point a student enters a program and at the point a student enters employment or transfers to an institution of higher education. Zero (0) indicates no definition or measurement. Two (2) indicates complete definition and measurement of communication and computation competencies. Section B (for vocational program managers only) asks for an assessment of the definition and measurement of the manipulative skills associated with a vocational program at the point the student exits the program and enters the occupation for which the student was trained.

Part II of the AA-3B report is also to be filled out by the program managers. Part II is an assessment of the process by which programs are changed or modified based upon various sources of information.

## PLACEMENT AND FOLLOW-UP REPORT

Follow-Up and Withdrawal Studies

Program Code: ____________

Program Title: ____________

Campus: ____________

Year Covered: ____________

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
Affirmative action/equal opportunity employer

College: ____________

Prepared by: ____________

Date Prepared: ____________

| Occupational Program Type: | Program Length: | Completion Award Type: |
|---|---|---|
| ____ Post-Secondary Technical<br>____ Post-Secondary Skilled/ Semi-skilled | Semester Credit ____ Hours<br>____ Clock Hours | ____ Associate in Arts<br>____ Associate in Science<br>____ Technical Certificate<br>____ Associate in Applied Science<br>____ Certificate of Applied Science<br>____ Certificate of Training |

| Data Categories | Non-Resident Alien | | Asian of Pacific Islander | | American Indian or Alaskan Native | | Black (not of Hispanic Origin) | | Hispanic | | White (not of Hispanic Origin) | | TOTALS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | Total |
| 3. FOLLOW-UP STUDIES<br>A. Number of students (unduplicated count) | | | | | | | | | | | | | | | |
| 4. WITHDRAWAL STUDIES<br>A. Number of students contacted through interviews or responding to a questionnaire. (Unduplicated count) | | | | | | | | | | | | | | | |
| B. Students planning to return | | | | | | | | | | | | | | | |
| C. Students who feel that they have achieved their educational goal prior to completing the program | | | | | | | | | | | | | | | |
| D. Students NOT achieving their educational goal and not planning to continued their education | | | | | | | | | | | | | | | |

16.8

AA-3A

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
Affirmative action/equal
opportunity employer

## DIVISION OF COMMUNITY COLLEGES

### Placement and Follow-Up
### Program Evaluation Report

(THIS REPORT IS TO BE COMPLETED BY THE PROGRAM MANAGER)

College ____________________________________

Name of Program Evaluated ______________________________ Program Manager ______________________________

PART I Communication and Computation Status Rating. To be reported for both Vocational Programs and Transfer Programs. (0 = competencies not defined or measured, and 2 = competencies defined and measured.) CHECK THE APPROPRIATE BOX

A. PROGRAM ENTRY COMMUNICATION AND COMPUTATION COMPETENCIES DEFINED AND MEASURED

| | 0 | 1 | 2 |
|---|---|---|---|
| Communication | ☐ | ☐ | ☐ |
| Computation | ☐ | ☐ | ☐ |

EMPLOYMENT ENTRY OR ENTRY INTO HIGHER EDUCATION COMPETENCIES DEFINED AND MEASURED

| | 0 | 1 | 2 |
|---|---|---|---|
| Communication | ☐ | ☐ | ☐ |
| Computation | ☐ | ☐ | ☐ |

B. Skill Competency Rating - for Vocational Programs only. (Skills are defined as those manipulative abilities associated with a particular vocational training program.)

EMPLOYMENT SKILL COMPETENCIES DEFINED AND MEASURED

| 0 | 1 | 2 |
|---|---|---|
| ☐ | ☐ | ☐ |

PART II Program managers should be able to answer the following questions after reviewing the AA Series, as well as the information contained in the community college/state university system G.P.A. Matrix report and the SUS/Department of Commerce Feedback report - plus any other sources of information.

1. Which of the following reports have you reviewed?

   The AA Series - 1, 2, 3, 4, 5 _____ GPA Matrix _____ SUS/Dept. of Commerce Feedback _____

2. What other sources of information do you use in evaluating the performance of students?

3. What findings or conclusions have resulted from the placement and follow-up evaluation of students who completed the program?

4. In light of the findings or conclusions, what changes are being considered and/or have been made in the expected outcomes of the program?

5. In light of the findings or conclusions, what changes are being considered and/or have been made in the design and implementation of the instructional support components of the program?

6. Are there requirements of law or regulations external to the college which inhibit needed program modifications? (If so, please explain.)

7. What findings or conclusions result from the study of students who withdraw from the program prior to completion of the program?

8. The average monthly starting salary range (gross) for the completors from the program. (Please review the SUS/Department of Commerce Feedback report for this information.)

9. Please provide an opinion of employer satisfaction with the performance of the completors from this program as compared to the performance of persons who did not receive training in a vocational program.

## Description of the Completer/Leaver Follow-Up Form (CLFU) Items Required

The CLFU form is fundamentally self-explanatory. Additional notes are provided below.

1. Educational Status - The Completer/Leaver Follow-Up Report differentiates between attending school and not attending school.

2. Employment Status - Self-explanatory.

3. Employer, Supervisor, Job Title, and Job Duties - The employer supervisor information is not needed for the Completer/Leaver Follow-Up Report, but is necessary to determine the recipient of the Employer Follow-Up Form (NCES 2404-6).

4. Job Relatedness to Training - A Minnesota study indicated that the individual's identification of relatedness seems to be as valid as any existing procedure for determining relatedness. However, State officials may wish to consider the individual's statements of job title and job duties as an additional indication of relatedness.

5. Current Salary - Since many individuals know their salary by measures other than hourly (e.g., monthly, annually), NCES recommends that States use the format provided. This information can be converted to hourly salary by using the data in items 5 and 6 and applying the relationship

   1 year = 12 months = 52 weeks.

6. Hours Employed per Week - Self-explanatory.

Upon receipt of the CLFU from the former student, the information should be linked to that individual. If the former student does not return the CLFU this should be reflected in the linkage by defining the individual's education and employment status as "Unknown". The remaining items would then be left blank.

Each community college may design its own form, which must include data elements on the CLFU verbatim. No changes in language on the CLFU are permitted.

## COMPLETER/LEAVER FOLLOW-UP FORM

NOTE: This report is authorized by law (20 USC 2312 and 20 USC 2391). While you are not required to respond to this survey, your cooperation is needed to insure that the results of this effort are comprehensive, reliable, and timely.

1. What is your current educational status? (Check one.)
   - ______ Currently attending school
   - ______ Not currently attending school

2. What is your current employment status? (Check one.)
   - ______ Employed (Includes all employment, even if below your qualifications; does not include full-time military service.)
   - ______ Employed (Full-time military service.)
   - ______ Unemployed (Not employed, but actively seeking employment.)
   - ______ Not in the labor force (Not employed and not seeking employment because of choice, illness, full-time student status, retirement, pregnancy, or other such reason.)

NOTE: If you are currently employed, please answer the remaining questions.
Otherwise, skip the remaining items.

3. Please provide the following information on your present job:
   Name of Company or Firm (If self-employed, please write self.)

   ________________________________________

   Company or Firm Mailing Address

   ________________________________________

   City __________ State ______ Zip Code ______

   Your Immediate Supervisor
   Last Name __________ First Name ________ M. I. ____

   PRESENT JOB INFORMATION:

   Job Title ______________________________

   Job Duties ______________________________
   ______________________________

4. Is this job related to your field of vocational training?
   - ______ Yes, it is directly or closely related.
   - ______ No, it is only remotely related or is not related at all.

5. What is your current salary before deductions? (Do not add in overtime.)
   $________ per________

6. The salary in the preceding item is based on how many hours per week employment?
   ________ hours per week

Thank you very much for your cooperation. Please return this form in the enclosed envelope.

NCES Form 2404-5

Description of the Employer Follow-Up Form (EFU) Items Required - The form should be self-explanatory. Employer Follow-Up Forms are sent only to employers of those students (completers and leavers) who indicated that they WERE EMPLOYED IN A FIELD RELATED TO THEIR TRAINING, civilian only. A self-employed person does not receive a follow-up form.

Each community college may design its own form, which must include data elements on the EFU verbatim. No changes in the language on the EFU are permitted.

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NAME ____________________

I.D. ____________________

PROGRAM TITLE ____________________

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## EMPLOYER FOLLOW-UP FORM

NOTE: This report is authorized by law (20 USC 2312 and 20 USC 2391). While you are not required to respond to this survey, your cooperation is needed to insure that the results of this effort are comprehensive, reliable, and timely. No student identifiers will be forwarded to the Federal government.

**1. VOCATIONAL TRAINING EVALUATION**

Please rate the vocational training received by the individual in the following areas:

| | Very Good | Good | Average | Poor | Very Poor |
|---|---|---|---|---|---|
| a. Technical knowledge | ☐ | ☐ | ☐ | ☐ | ☐ |
| b. Work attitude | ☐ | ☐ | ☐ | ☐ | ☐ |
| c. Work quality | ☐ | ☐ | ☐ | ☐ | ☐ |
| | (5) | (4) | (3) | (2) | (1) |

**2. OVERALL RATING**

What is your *overall* rating of the vocational training received by this individual as it relates to the requirements of his or her job?

| Very Good | Good | Average | Poor | Very Poor |
|---|---|---|---|---|
| ☐ | ☐ | ☐ | ☐ | ☐ |
| (5) | (4) | (3) | (2) | (1) |

**3. RELATIVE PREPARATION**

As a result of this person's vocational training, how would you rate his or her preparation in relation to other employees in his or her work group who did not receive the same training?

☐ No basis for comparison
(5) ☐ Individual is better prepared
(3) ☐ Both are about the same
(1) ☐ Individual is less prepared

NCES Form 2404-6

## INSTRUCTIONS FOR AA-4 EMPLOYER RATING SUMMARY REPORT

Separate forms should be submitted for completers and leavers. Check the appropriate line in the top part of the form to identify which type student the report represents.

Number of Respondents - In the first row of the AA-4 the number of EFU Forms that were completed and returned (which relate to the column in which the entry is being made) should be entered. Thus, if 37 forms were completed and returned for Male Hispanics, the entry in the first row and the tenth column of Part 1 would be 37.

Employer Ratings - In the remaining rows, the total score from the employer ratings for each item of the EFU forms should be entered. These scores should be calculated by assigning "points" to each response as indicated below:

Items 1a, 1b, 1c, and 2 (EFU)

5 - Very Good
4 - Good
3 - Neutral
2 - Poor
1 - Very poor

Item 3 (EFU)

* - No basis for comparison
5 - Individual is better prepared
3 - Both are about the same
1 - Individual is less prepared

* Do not include these marks in figuring

After 'scoring" each item for each individual in this way, add the scores. Also record the number of scores there were for each category. Note that with item 3 (Relative Preparation), you should not include those forms in which the "No Basis for Comparison" box was checked in determing the rating.

The total scores, once calculated, and the number of scores should be entered in the appropriate rows and columns of the various parts of AA-4.

The Totals column should equal the sum of the first twelve columns. The sum of the Special Needs columns may not equal the Totals column.

Column Headings - The column headings refer to the same racial and special needs breakdown as defined for the AA-1A and the AA-2.

Program Code:______________________________

Program Title:______________________________

Campus:______________________________

Year Covered:______________________________

Correction:______________________________

DIVISION OF COMMUNITY COLLEGES
EMPLOYER FOLLOW-UP REPORT
EMPLOYER RATING SUMMARY

College:______________________________

Prepared by:______________________________

Date Prepared:______________________________

Completers:______________________________

Leavers:______________________________

Occupational Program Type:

____Post-Secondary Technical
____Post-Secondary Skilled/Semi-skilled

Program Length:

____Semester Credit Hours
____Clock Hours

Complete Award Type:

____Associate in Arts
____Associate in Science
____Technical Certificate
____Associate of Applied Science
____Certificate of Applied Science
____Certificate of Training

| EMPLOYER RATINGS | | Non-Resident Alien | | Asian or Pacific Islander | | American Indian or Alaskan Native | | Black (Not of Hispanic Origin) | | Hispanic | | White (Not of Hispanic Origin) | | TOTALS | SPECIAL NEEDS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | | Handicapped | Limited English Proficiency | Disadvantaged |
| Number of Respondents | Total # of forms | | | | | | | | | | | | | | | | |
| Technical | # of scores | | | | | | | | | | | | | | | | |
| Knowledge | Total score | | | | | | | | | | | | | | | | |
| Work | # of scores | | | | | | | | | | | | | | | | |
| Attitude | Total score | | | | | | | | | | | | | | | | |
| Work | # of scores | | | | | | | | | | | | | | | | |
| Qaulity | Total score | | | | | | | | | | | | | | | | |
| Overall | # of scores | | | | | | | | | | | | | | | | |
| Rating | Total score | | | | | | | | | | | | | | | | |
| Relative | # of scores | | | | | | | | | | | | | | | | |
| Preparation | Total score | | | | | | | | | | | | | | | | |

16.15

AA-4

## INSTRUCTION FOR AA-5 FIELD OF EMPLOYMENT AND AVERAGE HOURLY SALARY

On the AA-5, Section 1, indicate the number of occupational preparatory completers only who were employed in the field for which they were trained or were employed in a non-related field and not pursuing additional education.

The distribution of the count for each instructional program by Standard Occupational Classification (SOC) Category (Field of Employment) can be determined from the respondent's Completer/Leaver Follow-Up Form. Item 3 on the Completer/Leaver Follow-Up Form will provide job title and job duties information that can be translated into the appropriate SOC Category. Definitions for each two-digit SOC category are provided beginning on page 16.18.

"Average Hourly Salary" for the AA-5, Section II, should be calculated only for those individuals who are employed full-time in fields for which they were trained, civilian only. Full-time shall be interpreted as at least 35 hours per week. The average of these hourly salaries should then be entered in the appropriate male/female "Average Hourly Salary" space in Section II. As an example, if the salaries per hour for all males were:

$4.60
3.85
2.77
$11.22 ÷ = $3.75 (average)

The average, $3.75, would be entered as the average salary for males.

Number refers to the number of persons from which the average is computed. In this example, number equals 3. The information on average weekly wage contained in the Feedback System reports may be used for this form. Convert from full-time weekly wage to hourly wage by dividing by 40. For the purposes of this report, if Feedback System data is used, base it upon only those persons working the full 13 weeks.

NOTE: Occupational Home Economics only reported on AA-5.

DIVISION OF COMMUNITY COLLEGES
PLACEMENT AND FOLLOW-UP REPORT
Field of Employment and Average Hourly Salary

(COMPLETERS ONLY)

Program Code: ____________

Program Title: ____________

Campus: ____________

Year Covered: ____________

College: ____________

Prepared by: ____________

Date Prepared: ____________

| Occupational Program Type: | Program Length: | Completion Award Type: | |
|---|---|---|---|
| ___ Post-Secondary Technical<br>___ Post-Secondary Skilled/Semi-skilled | ___ Semester Credit Hours<br>___ Clock Hours | ___ Associate in Arts<br>___ Associate in Science<br>___ Technical Certificate | ___ Associate in Applied Science<br>___ Certificate of Applied Science<br>___ Certificate of Training |

SECTION I. OCCUPATIONAL FIELD OF CURRENT EMPLOYMENT

Standard Occupational Classification (SOC)

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 14 | ____ | 37 | ____ | 46-47 | ____ | 57 | ____ | 77 | ____ |
| 17 | ____ | 38 | ____ | 48 | ____ | 58 | ____ | 99 | ____ |
| 29 | ____ | 39 | ____ | 51 | ____ | 61 | ____ | | |
| 30 | ____ | 41 | ____ | 52 | ____ | 64 | ____ | | |
| 32 | ____ | 42 | ____ | 53 | ____ | 67 | ____ | | |
| 36 | ____ | 45 | ____ | 55 | ____ | 72 | ____ | | |

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SECTION II. AVERAGE HOURLY SALARY*

| | Male | Female |
|---|---|---|
| Number of persons | ________ | ________ |
| Average Salary | $__ __.__ __ | $__ __.__ __ |

* In Section II include salaries for full-time employment in a field related to training.

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
Affirmative action/equal
opportunity employer

AA-5

# TWO-DIGIT STANDARD OCCUPATIONAL CLASSIFICATION (SOC)
# CODES FOR AA-5 PLACEMENT AND FOLLOW-UP REPORT
# FIELD OF EMPLOYMENT AND AVERAGE HOURLY SALARY

This attachment contains brief descriptions of the 26 two-digit SOC codes used in Part D of the Completer/Leaver Follow-Up Report (NCES 2404-7). These descriptions are taken from the Standard Occupational Classification Manual.* These are presented for informational use only. In order to assign the appropriate two-digit code to the returned Student Follow-Up Form, the Standard Occupational Classification Manual must be consulted. It contains detailed descriptions and lists of occupations.

## 14 MANAGEMENT RELATED OCCUPATIONS

This major group includes occupations primarily concerned with planning, organizing, directing, and controlling, through subordinate supervisory personnel, specialized functions in support of management, such as examining, analyzing, and interpreting financial records and policies; reviewing and analyzing organizational structures, methods, systems, and administrative practices; conducting programs of employee placement, recruitment, selection, training, promotion, welfare, safety, compensation, and recreation; purchasing goods for internal organizational use; buying, selling, leasing, or managing property; and enforcing or advising on standards of performance and adherence to regulations.

For example: accountant, auditor, recruiter, fiscal agent, employment-and-claims aide, grain buyer, administrative secretary

## 17 COMPUTER, MATHEMATICAL, AND OPERATIONS RESEARCH OCCUPATIONS

This major group includes occupations concerned with the application of mathematical knowledge to the conduct of research and development and related activities. Data processing programmers are classified in minor group 393.

For example: computer systems analyst, operations researcher and analyst, actuary, statistician

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*Standard Occupational Classification Manual, 1977, Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402, Stock No. 041-001-00153-1

## 29 REGISTERED NURSES

This major group includes occupations involving the planning, delivery, and evaluation of nursing care and a wide variety of nursing services including health maintenance and prevention of illness, and treatment of illness under a physician's instructions. Licensed Practical Nurses (LPN) are classified in minor group 366.

For example: school nurse, office nurse, general duty nurse

## 32 WRITERS, ARTISTS, PERFORMERS, AND RELATED OCCUPATIONS

This major group includes occupations concerned with creating and executing artistic works in a personally interpreted manner, by painting, sculpturing, drawing, engraving, etching, and other methods; creating designs for industrial and commercial products and interior decorations; designing cartoons and illustrations for books, magazines, and other publications; applying artistic media for illustrative, decorative, and sales promotion purposes; obtaining pictures and likenesses with still, motion picture, and television cameras. It includes occupations concerned with producing, directing, staging, and acting in motion picture, broadcast, and theatrical productions; composing, adapting, conducting, and performing musical works and dances; performing a variety of amusing, mystifying, and spectacular acts for entertainment of audiences.

For example: author, clothes designer, illustrator, graphic designer, cartoonist, decorator, musician, composer, actor, photographer, stage manager.

## 36 HEALTH TECHNOLOGISTS AND TECHNICIANS

This major group includes occupations concerned with carrying out technological and technical functions in a medical specialization to obtain data for use in diagnosis, treatment, and control of diseases, using knowledge of scientific and mathematical principles and medical laboratory practices. Dental laboratory technologists and technicians are classified in unit group 7265.

For example: clinical laboratory technician, dental hygienist, radiologic technician, licensed practical nurse, pharmacy assistant, emergency medical technician.

## 37 ENGINEERING AND RELATED TECHNOLOGISTS AND TECHNICIANS

This group includes occupations concerned with assisting engineers in both laboratory and production activities. Performs technical tasks under the general supervision of an engineer, utilizing basic knowledge of specific engineering, scientific, mathematical, and drafting design, principles, and techniques. May perform procedures and related activities independently.

For example: electrical technician, electronics technician, industrial engineering technician, mechanical-engineering technician, heat transfer technician, welding technician, sound mixer, recording engineer, and drafting and surveying technicians.

## 38 SCIENCE TECHNOLOGISTS AND TECHNICIANS

This major group includes occupations concerned with assisting scientists in both laboratory and production activities. Performs technical tasks under the general supervision of a scientist, utilizing basic knowledge of specific scientific and mathematical principles and techniques. May perform technical procedures and related activities independently.

For example: biological technologist and technician, except health; chemical and nuclear technologist and technician, mathematical technician.

## 39 TECHNICIANS: EXCEPT HEALTH, ENGINEERING, AND SCIENCE

This major group includes occupations concerned with performing technical tasks, except in the fields of health, engineering, and science.

For example: air traffic controller, radio operator, programmer, legal technician, teacher aide, embalmer, sound-effects technician.

## 41 SALES OCCUPATIONS, COMMODITIES

This major group includes occupations concerned with conducting wholesale and retail businesses which sell commodities on own or owners' behalf or in partnership; supervising and coordinating activities of workers directly and indirectly engaged in selling commodities; selling machinery and equipment and providing technical information about their composition, utilization, and maintenance; selling products of manufacturers to wholesale and retail establishments; selling commodities on a wholesale basis usually in a specific geographic area;

## 41 SALES OCCUPATIONS, COMMODITIES (CONTINUED)

and selling and demonstrating commodities in wholesale and retail establishments and homes, on the street, and from door to door. Sales managers are classified in minor group 125.

For example: technical sales worker and service advisor, sales representative, commodities salesperson, other sales occupations (sales clerk, street vendor, news vendor).

## 42 INSURANCE, SECURITIES, REAL ESTATE, AND SERVICE SALES OCCUPATIONS

This major group includes occupations concerned with selling various types of insurance; selling and leasing real estate; buying and selling securities; and selling advertising and business services.

For example: insurance sales agent, real estate sales agent, securities sales agent, advertising salesperson, travel agent, equipment rental clerk.

## 45 SUPERVISORS; CLERICAL OCCUPATIONS*

This major group includes occupations concerned with supervising the preparing, transcribing, transferring, systematizing, and preserving written communications and records; collecting accounts; gathering and distributing information; operating office machines and electronic data-processing equipment; storing, distributing, and accounting for stores of materials; operating telephone switchboards, distributing mail and delivering messages; and performing other clerical duties.

For example: clerical supervisors (except equipment operators) of general office clerical occupations, secretaries and stenographers, typists and related keyboard operators and the like; supervisors of office and computer equipment operators.

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*The Business and Office Division of the American Vocational Association (AVA) and the National Business Education Association (NBEA), as well as teacher educators, supervisors, and classroom teachers, have taken exception to use of the term "Clerical" in these titles. These concerns have been transmitted to the Office of Management and Budget for consideration and possible title revision.

## 46-47 CLERICAL OCCUPATIONS, EXCEPT EQUIPMENT OPERATORS*

This major group includes occupations concerned with preparing, transcribing, transferring, systematizing, and preserving written communications and records; collecting accounts; gathering and distributing information; storing, distributing, and accounting for stores of materials; operating telephone switchboards, distributing mail and delivering messages; and performing other clerical duties. Occupations concerned with the operation of computing and office machines are classified in major group 48.

For example: secretaries and stenographers, typists and related keyboard operators, general office clerical occupations, information clerks, communications equipment operators, correspondence clerks and order clerks, cashiers and bank tellers, record clerks, bookkeepers, billing, accounting, and statistical clerks.

## 48 COMPUTING AND OFFICE EQUIPMENT OPERATIONS

This major group includes occupations concerned with operating office and computing machines as a substantial part of their work. Workers using machines incidentally in the course of their activities are not necessarily classified here.

For example: computer and peripheral equipment operators; billing, posting, and calculating machine operators; duplicating, mail, and other office machine operators.

## 51 PROTECTIVE SERVICE OCCUPATIONS

This major group includes occupations concerned with providing protection against fire, accidents, damage, and other emergencies, and maintaining custody of prisoners in jails, reformatories, or penitentiaries.

For example: firefighting and fire prevention occupations, police and detectives, guards.

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*The Business and Office Division of the American Vocational Association (AVA) and the National Business Education Association (NBEA), as well as teacher educators, supervisors, and classroom teachers, have taken exception to use of the term "Clerical" in these titles. These concerns have been transmitted to the Office of Management and Budget for consideration and possible title revision.

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## 52 SERVICE OCCUPATIONS, EXCEPT PRIVATE HOUSEHOLD AND PROTECTIVE

This major group includes occupations primarily concerned with providing catering services including cooking, preparing and serving food and beverages; providing accommodation services; maintaining cleanliness in establishments, such as hotels, motels, lodging houses, apartment and office buildings; assisting health practitioners; controlling pests and vermin; escorting guests and handling baggage; preparing sleeping accommodations; cutting and styling hair, and giving beauty treatments to patrons, providing personal services, such as ushering, and arranging for patrons' comfort on tours, aboard ships and airplanes; washing, cleaning, drying, pressing and dyeing apparel and textile furnishings; cleaning building interiors and equipment, operating elevators, and performing minor maintenance repairs; and providing other related services.

For example: food and beverage preparation and service occupations, health service occupations (DENTAL ASSISTANTS, health aides, nursing aides, orderlies, and attendants); cleaning and building service occupations, except private household; personal service occupations; cosmetologists, guides, ushers, welfare service aides, child care workers, except private household.

## 53 PRIVATE HOUSEHOLD OCCUPATIONS

This major group includes occupations concerned with the performance of household tasks in and around a private dwelling in which the employer is the individual for whom these tasks are performed. Occupations performed by employees of establishments providing such services to dwellings on a contract basis are classified in Service Workers, except Private Household.

For example: day worker, launderer and ironer, private household cook, housekeeper and butler, private household child care worker, cleaner, and servant.

## 55 FARM OPERATORS AND MANAGERS

This major group includes occupations concerned with managing land, labor, and capital in order to maximize production and profits. Skills in and knowledge of the production and marketing of plants, animals, and their products are required. Managers' and/or operators' skills and knowledge requirements vary according to the type and size of farm enterprise. Performs duties described under master title for Managers.

## 55 FARM OPERATORS AND MANAGERS (CONTINUED)

For example: farmer (working proprietor), farm manager

## 57 FORESTRY AND LOGGING OCCUPATIONS

This major group includes occupations concerned with the maintenance of woodlot and forest stands; also in the felling and removal of trees and the harvesting of forest products such as sap, Christmas trees, and decorative greens. Operators of material moving equipment are classified in minor groups 641 and 651.

For example: supervisors of forestry and logging workers, forestry workers except logging, timber cutting and related occupations, logging occupations.

## 58 FISHERS, HUNTERS, AND TRAPPERS

This major group includes occupations concerned with commercial or sport fishing, bounty hunting, and commercial or bounty trapping. Includes catching or gathering of aquatic animal life using seines, nets, lines or traps; the searching for and taking dead or alive, animals and wild pest birds by a variety of means, including weapons, poisons, and traps.

For example: captains and other officers of fishing vessels, fishers, hunters, and trappers.

## 61 CONSTRUCTION TRADES

This major group includes occupations concerned with constructing, altering, and maintaining buildings, other structures, roads, bridges, pipelines, and similar projects. Most of the occupations require two or more years of specific vocational preparation. Although some require less, the major group excludes elemental workers who may be assisting workers in the included occupations. Although the majority of these occupations are found in the construction industry, they may be found in virtually every two-digit Standard Industrial Classification Major Group. Construction laborers are classified in major group 81.

## 61 CONSTRUCTION TRADES (CONTINUED)

For example: brickmasons, stonemasons, and hard tile setters; carpenters and related workers; electricians and power transmission installers; painters, paperhangers, and plasterers; plumbers, pipefitters and steamfitters; construction trades helpers.

## 64-65 TRANSPORTATION AND MATERIAL MOVING OCCUPATIONS

The transportation occupations group includes occupations concerning the operating and controlling of equipment used to transport people or materials using vehicles. The materials moving occupations group is concerned with the operation of material moving equipment, except transportation. This equipment is usually stationary, or with limited range.

For example: motor vehicle operators (tractor-trailer-truck drivers, heavy truck drivers, bus drivers, taxicab drivers, and chauffeurs), rail transport occupations, water transportation occupations, airplane pilots and navigators, transportation occupations helpers, material moving equipment operators (hoist and winch operators, crane and tower operators, excavating and loading machine operators, industrial truck and tractor equipment operators), material moving equipment operators' helpers.

## 67 MECHANICS AND REPAIRERS

This major group includes occupations concerned with the adjustment, maintenance, part replacement, and repair of tools, equipment, and machines. Installation of such equipment may be included in this division if installation is usually done in conjunction with other duties of the repairers. Inspectors of such equipment are included if knowledge of the functions of the equipment is necessary to conduct inspection tests.

For example: vehicle and mobile equipment mechanics and repairers; garage and service station related occupations; industrial machinery repairers; machinery maintenance occupations; electrical and electronic equipment repairers; heating, air-conditioning, and refrigeration mechanics.

## 72 PRECISION PRODUCTION OCCUPATIONS

This major group includes occupations requiring a high degree of precision in the tasks performed, for the attainment of standards. These occupations in many cases require an ability to interpret detailed in-

## 72 PRECISION PRODUCTION OCCUPATIONS (CONTINUED)

structions and specifications. The amount of time spent in training for the exercise of these occupations is substantial, in most cases at least six months to a year and in many cases several years. Certain occupations in which similar tasks are performed but which do not require so high a degree of precision, judgment, and training are classified in other groups in this division.

For example: precision metal workers (tool and die makers, machinists, boilermakers); precision woodworkers; precision printing occupations (typesetters, lithographers); precision textiles, apparel, and furnishing machine workers (dressmakers, tailors, upholsterers, shoemakers, laundering, cleaning, and dyeing occupations); precision workers of assorted materials (dental laboratory and medical appliance technicians); precision food production occupations (butchers, bakers, candymakers); precision inspectors, testers, and graders .

## 77 FABRICATORS, ASSEMBLERS, AND HAND WORKING OCCUPATIONS

This major group includes occupations concerned with the fabrication, assembly, and hand finishing or other hand work involved in the production of manufactured goods. Hand tools may be used, but occupations concerned with producing goods using machinery are classified in major groups 73-76. These occupations may include the use of hand tools and hand-held power tools.

For example: welders and solderers; assemblers (framer, lamp-shade assembler, piano stringer, chair upholsterer, slip-seat coverer); hand working occupations (hand sewing occupations, hand cutting and trimming occupations, hand molding and casting occupations, hand engraving and printing occupations).

## 99 OCCUPATIONS NOT ELSEWHERE CLASSIFIED

This division includes occupations which cannot be classified in any other division. For purposes of this report, this division also includes occupational areas not preprinted on Form 2404-7, Part D, Section I. Each State must refer to the SOC Manual, to actually determine which occupations ought to be reported here.

For example: scuba diver, photographer helper, observer helper of seismic prospecting.

## SECTION 17

## COMMUNITY INSTRUCTIONAL SERVICES REPORT
(CI-1)

### Purpose of the Report

The form is designed to provide the necessary information to analyze and report activities in this subprogram on a systemwide basis.

### Definitions and Instructions

The CI report is an annual report which should reflect the prior academic year. Each entry is a summation of all individual courses in that category. The courses should have been completed within the time frame covered by this report.

Enrollment - This is the sum of all persons officially enrolled in all the courses in a specific category.

Fees Collected - This is the total revenue collected from student fees for all courses in a specific category. Do not include the amount for fees which were waived.

Salary Paid - Enter the total amount of salary expenditure paid by the college to the instructors of all the courses in a specific category.

### Due Date of the Report

Please refer to the schedule specified in the Chart of Reports in Section 1.

## DIVISION OF COMMUNITY COLLEGES

## COMMUNITY INSTRUCTIONAL SERVICES REPORT

Prepared by: ____________________ COLLEGE: ____________________

Date Prepared: ____________________

| CATEGORY | ENROLLMENT | FEES COLLECTED | SALARY PAID |
|---|---|---|---|
| 1.41 Citizenship Courses<br>1. Environmental Problems | | | |
| 2. Problems Related to Health | | | |
| 3. Safety | | | |
| 4. Human Relations Problems | | | |
| 5. Governmental Problems | | | |
| 6. Problems Relating to Child Rearing | | | |
| 7. Consumer Economics Problems | | | |
| 1.42 Recreational and Leisure Time Instruction | | | |

CI-1

Return to: Bureau of Research and Information Systems
Division of Community Colleges
Department of Education
Tallahassee, Florida 32301

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
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## SECTION 18

## ANNUAL REPORT OF OUTPUT
(OA-1)

### Purpose of the Report

The form is designed to report all the credits and credit equivalents awarded by a college during a given academic year. The information is used by the Division of Community Colleges to compare actual output with planned output and with input (registrations), and as a basis for assisting colleges in program development.

### Definitions and Instructions

The report is to include all the credits and credit equivalents awarded by the college during the academic year. Credit accepted through student transfer is not awarded by the college. The categories in which to report the information on the form are defined below.

Discipline - These are the discipline categories used in the Community College Information Classification Structure.

Credits - This is the number of semester credits awarded.

Credit Equivalents - This is the number of semester credit equivalents awarded. The equivalent is computed by dividing the required clock hours to complete the instruction by 27.

By Instruction - This is the number of credits or credit equivalents awarded students who satisfactorily completed the courses offered by the college.

By Examination - This is the number of credits or credit equivalents awarded students who demonstrated through some form of examination, without completing the instruction at the college, that they possess the knowledge and/or skill expected for satisfactory completion of the instruction offered by the college. Examples are CLEP credit, advanced placement credit, institutionally devised written or demonstration exams, externally devised exams the college decides to use, and portfolio or other evaluation such as is associated with the assessing of experiential learning.

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
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# DIVISION OF COMMUNITY COLLEGES
## ANNUAL REPORT OF OUTPUT

COLLEGE:

| Discipline | CREDITS | | CREDIT EQUIVALENTS | |
|---|---|---|---|---|
| | By Instruction | By Examination | By Instruction | By Examination |
| 1.11.01 Agric. & Nat.Res. | | | ▨ | ▨ |
| 1.11.02 Archit. & Environ. | | | ▨ | ▨ |
| 1.11.04 Biological Science | | | ▨ | ▨ |
| 1.11.09 Engineering | | | ▨ | ▨ |
| 1.11.12 Health Professions | | | ▨ | ▨ |
| 1.11.19 Physical Sciences | | | ▨ | ▨ |
| 1.12.10 Fine & Applied Arts | | | ▨ | ▨ |
| 1.13.11 Foreign Languages | | | ▨ | ▨ |
| 1.13.15 Letters | | | ▨ | ▨ |
| 1.14.03 Education | | | ▨ | ▨ |
| 1.15.05 Business & Management | | | ▨ | ▨ |
| 1.16.07 Computer & Infor.Sci. | | | ▨ | ▨ |
| 1.16.17 Mathematics | | | ▨ | ▨ |
| 1.17.03 Area Studies | | | ▨ | ▨ |
| 1.17.20 Psychology | | | ▨ | ▨ |
| 1.17.22 Social Sciences | | | ▨ | ▨ |
| 1.18.06 Communications | | | ▨ | ▨ |
| 1.18.13 Home Economics | | | ▨ | ▨ |
| 1.18.14 Law | | | ▨ | ▨ |
| 1.18.16 Library Science | | | ▨ | ▨ |
| 1.18.18 Military Science | | | ▨ | ▨ |
| 1.18.21 Public Affairs | | | ▨ | ▨ |
| 1.18.23 Theology | | | ▨ | ▨ |
| 1.18.49 Interdisciplinary | | | ▨ | ▨ |
| TOTAL Adv. & Prof. | | | ▨ | ▨ |
| 1.21.00 Agriculture | | | | |
| 1.22.00 Distributive | | | | |
| 1.23.00 Health | | | | |
| 1.24.00 Home Economics | | | | |
| 1.25.00 Office | | | | |
| 1.26.00 Trade & Ind. | | | | |
| 1.27.00 Public Service | | | | |
| TOTAL Occupational | | | | |
| 1.31.00 Compensatory | | ▨ | | |
| 1.32.00 Adult Elem. & Sec. | ▨ | ▨ | | |
| TOTAL Developmental | | | | |
| 1.41.00 Citizenship | ▨ | ▨ | | |
| 1.42.00 Recr. & Leisure | ▨ | ▨ | | |
| TOTAL Community Instr. Services | ▨ | ▨ | | |
| COLLEGE TOTALS | | | | |

OA-1

Prepared By:____________________________

Date Prepared:____________________________ Signed:________________________
President

# Acceleration Report
## (OA-2)

## Purpose of the Report

The form is designed to report the acceleration credits and credit equivalents awarded by a college and the number of individuals receiving them to demonstrate that the college is providing mechanisms for students to progress as rapidly as possible toward their program objectives as required in State Board of Education Rule 6A-14.31.

## Definitions and Instructions

The report is to include all acceleration credits and credit equivalents awarded by the college during the academic year, and the number of recipients. Credit accepted through student transfer is not awarded by the college. The categories in which to report the information on the form are self-explanatory or defined below.

Credits - This is the number of semester credits awarded.

Credit Equivalents - This is the number of semester credit equivalents awarded. The equivalent is computed by dividing the required clock hours to complete the instruction by 27.

Individuals - This is the number of persons who successfully completed an instance of acceleration. This information is required in the column labeled Credits and in the column labeled Credit Equivalents.

Credit by Examination - This is the number of credits or credit equivalents awarded students and the number of students so awarded who earned such awards by demonstrating through some form of examination, without completing the instruction at the college, that they possess the knowledge and/or skill expected for satisfactory complecion of the instruction offered by the college. The subcategories are:

College Level Examination Program (CLEP)

CEEB Advanced Placement Program

Institutionally Devised Examinations - Examinations devised by the college to provide students the opportunity to demonstrate that they possess the knowledge and/or skill expected for satisfactory completion of instruction offered by the college without undergoing the instruction. The subcategories are:

Of Learning Sponsored by an Educational Institution - This subcategory and the next are intended to distinguish between the accessment of prior learning achieved from structured instructional delivery of another educational institution or other organization when the transfer of "credit" is not appropriate, and the assessment of prior learning not sponsored by another educational institution or other organization and often referred to as the assessment of non-sponsored experiential learning.

Of Learning Not Sponsored by an Educational Institution

Other Examinations - Examinations devised by some group external to the college but excluding the CLEP and the Advanced Placement Program. The subcategories are the same as for Institutionally Devised Examinations.

Dual Enrollment - This is the number of credits or credit equivalents awarded students by the college and the number of students so awarded who earned awards while simultaneously enrolled in another educational institution. The subcategories are:

College and High School - Where the simultaneous enrollment was in a high school, including adult high school.

College and Another Post Secondary Institution - Where the simultaneous enrollment was in another post secondary institution.

Early Admission - This is the number of credits or credit equivalents awarded students by the college and the number of students so awarded who earned such awards as a result of enrolling in the college in instruction judged to require college level entry competencies without having completed high school and without simultaenously enrolling in high school instruction, including adult high school.

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Tallahassee, Florida
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## DIVISION OF COMMUNITY COLLEGES

## ACCELERATION REPORT

Part I, Acceleration Measurement

College:____________________

| | CREDITS | | CREDIT EQUIVALENTS | |
|---|---|---|---|---|
| | Individuals | Credits | Individuals | Equivalents |
| 1. CREDIT BY EXAMINATION | | | | |
| A. College Level Examination Program (CLEP) | ____ | ____ | | |
| B. CEEB Advanced Placement Program | ____ | ____ | | |
| C. Institutionally Devised Examinations of Learning Sponsored by an Educational Institution | ____ | ____ | ____ | ____ |
| Of Learning NOT Sponsored by an Educational Institution | ____ | ____ | ____ | ____ |
| D. Other Examinations of Learning Sponsored by an Educational Institution | ____ | ____ | ____ | ____ |
| Of Learning NOT Sponsored by an Educational Institution | ____ | ____ | ____ | ____ |
| 2. DUAL ENROLLMENT | | | | |
| College and High School | ____ | ____ | ____ | ____ |
| College and Another Post Secondary Institution | ____ | ____ | ____ | ____ |
| 3. EARLY ADMISSION | ____ | ____ | ____ | ____ |

Part II, Acceleration Mechanisms

(Note any changes since the prior year report.)

1. How did you facilitate and encourage credit by examination, dual enrollment, and early admission during the prior year?

2. How do you plan to facilitate and encourage credit by examinations, dual enrollment, and early admission during the current year?

3. Attach a copy of your procedure and criteria for early admission.

OA-2

Prepared By:____________________ Date Prepared:____________________

## STAFF AND PROGRAM DEVELOPMENT REPORTS
## SPD Five-Year Goals Plan
## (SPD-1)

### Purpose of the Report

The form is designed to report a college's long-range (five-year) goals for staff and program development as required in State Board of Education Rule 6A-14.913.

### Instructions

On this form are identified the long-range goals for staff and program development as determined by a college. The span of the Goals Plan is five years. The Goals Plan is to be reviewed annually by the college and updated or continued.

The Goals Plan reflects a college's commitment to certain staff and program development goals identified by the college based on the study of its staff and program development needs. The Goals Plan identifies the areas of activitiy toward which SPD activities will be addressed.

The updated or continued Goals Plan for the subsequent five-year period is to be submitted annually for approval by the Director of the Division of Community Colleges by March 1.

### Definition

Goal - A goal is the end toward which effort is directed. Staff and program development goals are those goals within the overall goals of the college which are expressions of the mission or purpose toward which staff and program development efforts are directed.

# SPD Activity Evaluation
## (SPD-2)

### Purpose of the Report

The form is designed to report a college's evaluation of one of its staff and program development activities within the group of such activities conducted for the immediately preceding year as required in State Board of Education Rule 6A-14.913.

### Instructions

Reported on this form are the evaluations of staff and program development activities. An Activity Evaluation is to be prepared for each discrete activity rather than for a cluster of similar activities.

The collection of Activity Evaluations pertaining to the activities of the immediately preceding year is to be submitted annually to the Director of the Division of Community Colleges by September 10.

### Definitions

Staff Development - The development of staff is the improvement of staff performance through activities which update or upgrade competence specified for their present or planned positions. Staff is interpreted to include all personnel employed by the colleges.

Program Development - The development of programs is the evaluation and improvement of existing programs, to include the design of evaluation instruments to establish bases for improvements, as well as the designing of new programs. It is program initiation or improvement rather than maintenance or expansion of existing programs. Development may be in any or all of the community college information classification structure functions: instruction, organized research, public service, academic support, student support, institutional support, physical plant operation and maintenance, and student financial assistance. Program development includes researching, planning, designing, and evaluating; salary payment; and purchasing of instructional equipment.

## SPD Financial Report Summary
## (SPD-3)

### Purpose of the Report

The form is designed to summarize the staff and program development funds available and expended during the immediately preceding year as required in State Board of Education Rule 6A-14.913.

### Instructions

On this form are summarized the staff and program development funds availabl and the staff and program development funds expended during the immediately preceding year. The Financial Report Summary is to be submitted annually to the Director of the Division of Community Colleges by September 10.

Division of Community Colleges
STAFF AND PROGRAM DEVELOPMENT

Five-Year Goals Plan
July, 19__ through June, 19__

College: ____________________

Prepared By: ________________

Date Prepared: ______________

On this form are stated the institution's long-range (five year) goals for staff and program development. Following each goal statement is the rationale for the goal. (Due in the office of the director of the Division of Community Colleges by March 1).

1. GOAL:

   Rationale:

2. GOAL:

   Rationale:

3. GOAL:

   Rationale:

4. GOAL:

   Rationale:

-Over-

SPD-1. 4/1/79

5. **GOAL:**

**Rationale:**

6. **GOAL:**

**Rationale:**

7. **GOAL:**

**Rationale:**

8. **GOAL:**

**Rationale:**

(Use additional pages, if needed.)

---

The college has completed a study of the past year's SPD Five-Year Goals Plan and of the accomplishments of SPD activities since its preparation and of the current and future staff development and program development needs of the college. The SPD Five-Year Goals Plan presented above is the result of the study.

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
Affirmative action/equal opportunity employer

SUBMITTED BY:

APPROVED BY:

President ________________ Date ________

Director, DCC ________________ Date ________

Division of Community Colleges
STAFF AND PROGRAM DEVELOPMENT

Activity Evaluation

College: ____________________

Prepared By: ________________

Date Prepared: ______________

On this form is reported the institution's evaluation of one of its discrete SPD activities within the group of SPD activities conducted the immediately preceding year. (Due in the office of the director of the Division of Community Colleges by September 10. The set of Activity Evaluations is to be accompanied by an SPD Financial Report Summary.)

1. ____________________________________________
Title of Activity

2. Specific objectives (stated in performance terms) of the activity were:

3. Check the one Information Classification Structure category most affected by the activity.

| STAFF DEVELOPMENT | | PROGRAM DEVELOPMENT |
|---|---|---|
| ____________ | Instruction, Advanced and Professional | ____________ |
| ____________ | Instruction, Occupational | ____________ |
| ____________ | Instruction, Developmental | ____________ |
| ____________ | Instruction, Community Instructional Service | ____________ |
| ____________ | Organized Research | ____________ |
| ____________ | Public Service | ____________ |
| ____________ | Academic Support | ____________ |
| ____________ | Student Support | ____________ |
| ____________ | Institutional Support | ____________ |
| ____________ | Physical Plant Operation and Maintenance | ____________ |
| ____________ | Student Financial Assistance | ____________ |

4. Amount Budgeted, $__________

5. Amount Spent, $__________

-Over-

300

6. Status of the activity.

_____ Completed

_____ Not completed, will be continued

_____ Abandoned

_____ Never started

7. Was the procedure for achieving the specific objectives successful?

_____ Very successful, would recommend

_____ Successful in given situation

_____ Neutral in effect

_____ Not successful

_____ Not determinable at this time

8. Were the specific objectives met?

_____ Yes

_____ Partly

_____ No

_____ Not determinable at this time

9. To what degree was the related goal in the Five-Year Goals Plan achieved?

_____ Completely

_____ To a major degree

_____ To a minor degree

_____ No measurable effect on goal

10. Narrative evaluation, including results achieved. What has been the impact of the activity?

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
Affirmative action/equal
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Division of Community Colleges
STAFF AND PROGRAM DEVELOPMENT

Financial Report Summary

College: ____________________

Prepared By: ________________

Date Prepared: ______________

On this form are summarized the SPD funds available and the SPD funds expended during the immediately preceding year. (Due in the office of the director of the Division of Community Colleges by September 10.)

| | | |
|---|---|---|
| Closing Balance, June 30, 19__ | $________ | |
| Additions, 19__ - __ | ________ | |
| Total Available | | $________ |
| Total Expenditures | | ________ |
| Salaries | ________ | |
| Travel | ________ | |
| Equipment | ________ | |
| Contingency | ________ | |
| Other | ________ | |
| Closing Balance, June 30, 19__ | | $________ |
| Encumbered | ________ | |
| Unencumbered | ________ | |

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
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SPD-3, 4/1/79

# APPENDIX A

## Detail Coding for Advanced and Professional and Occupational Courses and Programs of Study

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# DETAIL CODING FOR ADVANCED AND PROFESSIONAL AND OCCUPATIONAL COURSES AND PROGRAMS OF STUDY

The following pages provide the detailed coding for Advanced and Professional (Part 1) and Occupational (Part 2) courses and programs. Note that the fourth through the seventh digits of the Advanced and Professional codes are taken from the Higher Education General Information Survey (HEGIS) Taxonomy. The coding logic and structure for Occupational courses and programs is similar to that found in USOE Handbook VI Standard Terminology for Curriculum and Instruction in Local and State School Systems. The major exception is the use of an additional cluster called Public Service and the deletion (non-use) of the Technical cluster. The rationale for this modification was that Technical is a level of instruction rather than a unique functional group. It was also based on the increasing number of public service programs that do not relate to the Trade and Industrial cluster.

With respect to the level of detail, the coding standards are as follows:

1. Each course (Advanced and Professional and Occupational) offered by the college will be given a seven digit code to identify them to the subcategory level.

2. Each Occupational program of study will be assigned a seven digit code. An eighth digit is also used to distinguish between programs that have the same seven digit code.

3. Each Advanced and Professional Program will be assigned a three digit code to identify student educational objectives to the cluster level.

# Appendix A

## Part 1

## Uniform Codes for Advanced and Professional Courses, Disciplines, and Instructional Programs

| Code | Descriptive Title |
|---|---|
| 1.11.XXXX | Natural Science (Cluster) |
| 1.11.01XX | Agriculture & Natural Resources |
| 0101 | Agriculture, general |
| 0102 | Agronomy |
| 0103 | Soils science |
| 0104 | Animal science |
| 0105 | Dairy science |
| 0106 | Poultry science |
| 0107 | Fish, game and wildlife management |
| 0108 | Horticulture |
| 0109 | Ornamental horticulture |
| 0110 | Agriculture and farm management |
| 0111 | Agriculture economics |
| 0112 | Agriculture business |
| 0113 | Food science |
| 0114 | Forestry |
| 0115 | Natural resources management |
| 0117 | Range management |
| 0118 | Citrus Farming |
| 1.11.02XX | Architecture and Environmental Design |
| 0201 | Environmental design, general |
| 0202 | Architecture |
| 0203 | Interior design |
| 0204 | Landscape architecture |
| 0205 | Urban architecture |
| 0206 | City, community, and regional planning |
| 1.11.04XX | Biological Science |
| 0401 | Biology, general |
| 0402 | Botany, general |
| 0403 | Bacteriology |
| 0404 | Plant pathology |
| 0405 | Plant pharmacology |
| 0406 | Plant physiology |
| 0407 | Zoology, general |
| 0408 | Pathology, human and animal |
| 0409 | Pharmacology, human and animal |
| 0410 | Physiology, human and animal |
| 0411 | Microbiology |
| 0412 | Anatomy |

| Code | Descriptive Title |
|---|---|
| Biological Science (continued) | |
| 0413 | Histology |
| 0414 | Biochemistry |
| 0415 | Biophysics |
| 0416 | Molecular biology |
| 0417 | Cell biology |
| 0418 | Marine biology |
| 0419 | Biometrics and biostatistics |
| 0420 | Ecology |
| 0421 | Entomology |
| 0422 | Genetics |
| 0423 | Radiobiology |
| 0424 | Nutrition, scientific |
| 0425 | Neurosciences |
| 0426 | Toxicology |
| 0427 | Embryology |
| 1.11.09XX | Engineering |
| 0901 | Engineering, general |
| 0902 | Aerospace, aeronautical and astronautical engineering |
| 0903 | Agricultural engineering |
| 0904 | Architectural engineering |
| 0905 | Bioengineering and biomedical engineering |
| 0906 | Chemical engineering |
| 0907 | Petroleum engineering |
| 0908 | Civil, construction, and transportation engineering |
| 0909 | Electrical, electronics, and communications engineering |
| 0910 | Mechanical engineering |
| 0911 | Geological engineering |
| 0912 | Geophysical engineering |
| 0913 | Industrial and management engineering |
| 0914 | Metallurgical engineering |
| 0915 | Materials engineering |
| 0916 | Ceramic engineering |
| 0917 | Textile engineering |
| 0918 | Mining and mineral engineering |
| 0919 | Engineering physics |
| 0920 | Nuclear engineering |
| 0921 | Engineering mechanics |
| 0922 | Environmental and sanitary engineering |
| 0923 | Naval architecture and marine engineering |
| 0924 | Ocean engineering |

| Code | Descriptive Title |
|---|---|
| 1.11.12XX | Health Professions |
| 1201 | Health professions, general |
| 1202 | Hospital and health care administration |
| 1203 | Nursing (four year programs) |
| 1204 | Dentistry, D.D.S or D.M.D. degree |
| 1205 | Dental specialties |
| 1206 | Medicine, M.D. degree |
| 1207 | Medical specialties |
| 1208 | Occupational therapy |
| 1209 | Optometry |
| 1210 | Osteopathic medicine, D.O. degree |
| 1211 | Pharmacy |
| 1212 | Physical therapy |
| 1213 | Dental hygiene |
| 1214 | Public health |
| 1215 | Medical record librarianship |
| 1216 | Podiatry or podiatric medicine |
| 1217 | Biomedical communication |
| 1218 | Veterinary medicine |
| 1219 | Veterinary medicine specialties |
| 1220 | Speech pathology and audiology |
| 1221 | Chiropractic |
| 1222 | Clinical social work |
| 1223 | Medical laboratory technologies |
| 1224 | Dental technologies |
| 1225 | Radiologic technologies |
| 1.11.19XX | Physical Sciences |
| 1901 | Physical sciences, general |
| 1902 | Physics, general |
| 1903 | Molecular physics |
| 1904 | Nuclear physics |
| 1905 | Chemistry, general |
| 1906 | Inorganic chemistry |
| 1907 | Organic chemistry |
| 1908 | Physical chemistry |
| 1909 | Analytical chemistry |
| 1910 | Pharmaceutical chemistry |
| 1911 | Astronomy |
| 1912 | Astrophysics |
| 1913 | Atmospheric sciences and meteorology |
| 1914 | Geology |
| 1915 | Geochemistry |
| 1916 | Geophysics and seismology |
| 1917 | Earth sciences, general |
| 1918 | Paleontology |
| 1919 | Oceanography |
| 1920 | Metallurgy |

| Code | Descriptive Title |
|---|---|
| 1.12.XXXX | Fine and Applied Arts |
| 1.12.10XX | Fine and Applied Arts |
| 1001 | Fine arts, general |
| 1002 | Art |
| 1003 | Art history and appreciation |
| 1004 | Music (performing, composition, theory) |
| 1005 | Music (liberal arts program) |
| 1006 | Music history and appreciation |
| 1007 | Dramatic arts |
| 1008 | Dance |
| 1009 | Applied design |
| 1010 | Cinematography |
| 1011 | Photography |
| 1.13.XXXX | Letters and Foreign Languages |
| 1.13.11XX | Foreign Languages |
| 1101 | Foreign languages, general |
| 1102 | French |
| 1103 | German |
| 1104 | Italian |
| 1105 | Spanish |
| 1106 | Russian |
| 1107 | Chinese |
| 1108 | Japanese |
| 1109 | Latin |
| 1110 | Greek, classical |
| 1111 | Hebrew |
| 1112 | Arabic |
| 1113 | Indian |
| 1114 | Scandinavian languages |
| 1115 | Slavic languages |
| 1116 | African languages |
| 1.13.15XX | Letters |
| 1501 | English, general |
| 1502 | Literature, English |
| 1503 | Comparative literature |
| 1504 | Classics |
| 1505 | Linguistics |
| 1506 | Speech, debate, and forensic science |
| 1507 | Creative writing |
| 1508 | Teaching of English as a foreign language |
| 1509 | Philosophy |
| 1510 | Religious studies |

| Code | Descriptive Title |
|---|---|
| 1.14.XXXX | Education |
| 1.14.08XX | Education |
| 0801 | Education, general |
| 0802 | Elementary education, general |
| 0803 | Secondary education, general |
| 0804 | Junior high school education |
| 0805 | Higher education, general |
| 0806 | Junior and community college education |
| 0807 | Adult and continuing education |
| 0808 | Special education, general |
| 0809 | Administration of special education |
| 0810 | Education of the mentally retarded |
| 0811 | Education of the gifted |
| 0812 | Education of the deaf |
| 0813 | Education of the culturally disadvantaged |
| 0814 | Education of the visually handicapped |
| 0815 | Speech correction |
| 0816 | Education of the emotionally disturbed |
| 0817 | Remedial education |
| 0818 | Special learning disabilities |
| 0819 | Education of the physically handicapped |
| 0820 | Education of the multiple handicapped |
| 0821 | Social foundations |
| 0822 | Education psychology |
| 0823 | Pre-elementary education |
| 0824 | Educational statistics and research |
| 0825 | Educational testing, evaluation and measurement |
| 0826 | Student personnel |
| 0827 | Educational administration |
| 0828 | Educational supervision |
| 0829 | Curriculum and instruction |
| 0830 | Reading education |
| 0831 | Art education |
| 0832 | Music education |
| 0833 | Mathematics education |
| 0834 | Science education |
| 0835 | Physical education |
| 0836 | Driver and safety education |
| 0837 | Health education |
| 0838 | Business, commerce, and distributive education |
| 0839 | Industrial arts, vocational, and technical education |
| 0840 | Foreign language education |

| Code | Descriptive Title |
|---|---|
| 1.15.XXXX | Business and Management |
| 1.15.05XX | Business and Management |
| 0501 | Business and commerce, general |
| 0502 | Accounting |
| 0503 | Business statistics |
| 0504 | Banking and finance |
| 0505 | Investments and securities |
| 0506 | Business management and administration |
| 0507 | Operations research |
| 0508 | Hotel and restaurant management |
| 0509 | Marketing and purchasing |
| 0510 | Transportation and public utilities |
| 0511 | Real estate |
| 0512 | Insurance |
| 0513 | International business |
| 0514 | Secretarial studies |
| 0515 | Personnel management |
| 0516 | Labor and industrial relations |
| 0517 | Business economics |
| 1.16.XXXX | Mathematics and Computer Science |
| 1.16.07XX | Computer and Information Science |
| 0701 | Computer and information sciences, general |
| 0702 | Information sciences and systems |
| 0703 | Data processing |
| 0704 | Computer programming |
| 0705 | Systems analysis |
| 1.16.17XX | Mathematics |
| 1701 | Mathematics, general |
| 1702 | Statistics, mathematical and theoretical |
| 1703 | Applied mathematics |

| Code | Descriptive Title |
|---|---|
| 1.17.XXXX | Social Sciences |
| 1.17.03XX | Area Studies |
| 0301 | Asian studies, general |
| 0302 | East Asian studies |
| 0303 | South Asian studies |
| 0304 | Southeast Asian studies |
| 0305 | African studies |
| 0306 | Islamic studies |
| 0307 | Russian and Slavic studies |
| 0308 | Latin American studies |
| 0309 | Middle Eastern studies |
| 0310 | European studies, general |
| 0311 | Eastern European studies |
| 0312 | West European studies |
| 0313 | American studies |
| 0314 | Pacific area studies |
| 1.17.20XX | Psychology |
| 2001 | Psychology, general |
| 2002 | Experimental psychology |
| 2003 | Clinical psychology |
| 2004 | Psychology for counseling |
| 2005 | Social psychology |
| 2006 | Psychometrics |
| 2007 | Statistics in psychology |
| 2008 | Industrial psychology |
| 2009 | Developmental psychology |
| 2010 | Physiological psychology |
| 1.17.22XX | Social Sciences |
| 2201 | Social sciences, general |
| 2202 | Anthropology |
| 2203 | Archaeology |
| 2204 | Economics |
| 2205 | History |
| 2206 | Geography |
| 2207 | Political science and government |
| 2208 | Sociology |
| 2209 | Criminology |
| 2210 | International relations |
| 2211 | Afro-American studies |
| 2212 | American Indian cultural studies |
| 2213 | Mexican-American cultural studies |
| 2214 | Urban studies |
| 2215 | Demography |

| Code | Descriptive Title |
|---|---|
| 1.18.XXXX | Other Disciplines |
| 1.18.06XX | Communications |
| 0601 | Communications, general |
| 0602 | Journalism |
| 0603 | Radio/television |
| 0604 | Advertising |
| 0605 | Communication media |
| 1.18.13XX | Home Economics |
| 1301 | Home economics, general |
| 1302 | Home decoration and home equipment |
| 1303 | Clothing and textiles |
| 1304 | Consumer economics and home management |
| 1305 | Family relations and child development |
| 1306 | Foods and nutrition |
| 1307 | Institutional management and cafeteria management |
| 1.18.14XX | Law |
| 1401 | Law, general |
| 1.18.16XX | Library Science |
| 1601 | Library science, general |
| 1.18.18XX | Military Science |
| 1801 | Military science, general |
| 1802 | Naval science |
| 1803 | Aerospace science |

| Code | Descriptive Title |
|---|---|
| 1.18.21XX | Public Affairs |
| 2101 | Community Services, General |
| 2102 | Public Administration |
| 2103 | Parks and Recreation Management |
| 2104 | Social Work and Helping Services |
| 2105 | Law Enforcement and Corrections |
| 2106 | International Public Service |
| 1.18.23XX | Theology |
| 1.18.49XX | Interdisciplinary |
| 4901 | General Liberal Arts and Sciences |
| 4902 | Biological and Physical Sciences |
| 4903 | Humanities and Social Sciences |
| 4904 | Engineering and Other Disciplines |
| 1.19.XXXX | General Degree Transfer |

## Appendix A
## Part 2

## Uniform Codes for Occupational Courses, Disciplines, and Instructional Programs

| Code | Descriptive Title |
|---|---|
| 1.21.XXXX | Agriculture |
| 1.21.01XX | Agriculture Production and Processing |
| 0101 | Animal science |
| 0102 | Plant science |
| 0103 | Farm mechanics |
| 0104 | Farm business management (Agri-business) |
| 0105 | Citrus production management |
| 0106 | Citrus processing technology |
| 0107 | Farm coop training |
| 1.21.02XX | Agriculture Supplies/Services |
| 0201 | Agriculture chemicals |
| 0202 | Feeds |
| 0203 | Seeds |
| 0204 | Fertilizers (plant food) |
| 0205 | Pest control technology |
| 1.21.03XX | Agricultural Mechanics |
| 0301 | Agricultural power & machinery |
| 0302 | Agricultural structures & conveniences |
| 0303 | Soil management |
| 0304 | Water management |
| 0305 | Agricultural mechanics skills |
| 0306 | Agricultural construction & maintenance |
| 0307 | Agricultural electrification |
| 0308 | Golf course mechanics |
| 1.21.04XX | Agriculture Products |
| 0401 | Food products |
| 0402 | Nonfood products |

| Code | Descriptive Title |
|---|---|
| 1.21.05XX | Ornamental Horticulture (Production, Processing, Marketing & Services) |
| 0501 | Aboriculture |
| 0502 | Floriculture |
| 0503 | Greenhouse operation & management |
| 0504 | Landscaping |
| 0505 | Nursery operation & management |
| 0506 | Turf management (golf course, etc.) |
| 1.21.06XX | Agricultural Resources (Conservation, Utilization, and Services) |
| 0601 | Forests |
| 0602 | Recreation (Parks, etc.) |
| 0603 | Soil |
| 0604 | Wildlife (Including game farms & hunting areas) |
| 0605 | Water |
| 0606 | Air |
| 0607 | Fish (Including farms and hatcheries) |
| 0608 | Range (Ranch) |
| 1.21.07XX | Forestry (Production, Processing, Management, Marketing, and Services) |
| 0701 | Forests |
| 0702 | Forest protection |
| 0703 | Logging (harvesting and transportation) |
| 0704 | Wood utilization |
| 0705 | Recreation |
| 0706 | Special products |
| 1.21.99XX | Other Agricultural |
| 9901 | Biological parks |

| Code | Descriptive Title |
|---|---|
| 1.22.XXXX | Distributive |
| 1.22.0100 | Advertising Services |
| 1.22.0200 | Apparel and Accessories (Fashion) |
| 1.22.0300 | Automotive (Sales) |
| 1.22.0400 | Finance and Credit (Banking, S & L, etc.) |
| 1.22.0500 | Floristry |
| 1.22.0600 | Food Distribution |
| 1.22.0700 | Food Services |
| 1.22.0800 | General Merchandise |
| 1.22.0900 | Hardware, Building Materials, Farm and Garden Supplies & Equipment |
| 1.22.1000 | Home Furnishings |
| 1.22.1100 | Hotel and Lodging |
| 1.22.1200 | Marketing and Distribution |
| 1.22.1300 | Insurance |
| 1.22.1400 | International Trade |
| 1.22.1500 | Personal Services |
| 1.22.1600 | Petroleum |
| 1.22.1700 | Real Estate |
| 1.22.1800 | Recreational and Tourism |
| 1.22.1900 | Transportation |
| 1.22.2000 | Retail Trade |
| 1.22.3100 | Wholesale Trade |
| 1.22.9900 | Other Distributive (General Marketing, etc.) |

| Code | Descriptive Title |
|---|---|
| 1.23.XXXX | Health Occupations Education |
| 1.23.01XX | Dental |
| 0101 | Dental Assisting |
| 0102 | Dental Hygiene (Associate Degree) |
| 0103 | Dental Laboratory Technology |
| 1.23.02XX | Medical Laboratory Technology |
| 0201 | Cytology (Cytotechnology) |
| 0202 | Histology |
| 0203 | Medical Laboratory Assisting |
| 0204 | Hematology |
| 0205 | Certified Laboratory Assistant |
| 1.23.03XX | Nursing |
| 0301 | Nursing (Associate Degree) RN |
| 0302 | Practical (Vocational) Nursing |
| 0303 | Nursing Assistance (Aide) |
| 0304 | Psychiatric Aide |
| 0305 | Surgical Technician (Operating Room Technician) |
| 0306 | Obstetrical Technician |
| 0307 | Home Health Aide |
| 0308 | School Health Aide |
| 0309 | Central Service Aide |
| 0310 | Medical Assisting |
| 1.23.04XX | Rehabilitation |
| 0401 | Occupational Therapy |
| 0402 | Physical Therapy |
| 0403 | Prosthetics |
| 0404 | Orthotics |
| 1.23.05XX | Radiologic |
| 0501 | Radiologic Technology (X-Ray) |
| 0502 | Radiation Therapy |
| 0503 | Nuclear Medical Technology |

| Code | Descriptive Title |
|---|---|
| 1.23.06XX | Ophthalmic |
| 0601 | Ophthalmic Dispersing |
| 0602 | Orthoptics |
| 0603 | Optometrist Assistant |
| 1.23.07XX | Environmental Health |
| 0701 | Environmental Health Assistant |
| 0702 | Radiological Health Technician |
| 0703 | Sanitarian Assistant |
| 1.23.08XX | Mental Health |
| 0801 | Mental Health Technician (Human Service Aide, etc.) |
| 0802 | Mental Retardation Aide |
| 1.23.09XX | Miscellaneous Health Education |
| 0901 | Electroencephalograph Technician |
| 0902 | Electrocardiograph Technician |
| 0903 | Inhalation Therapy (Respiratory Therapy) |
| 0904 | Medical Assistant (Assistant in Physician's Office) |
| 0905 | Central Supply Technician |
| 0906 | Community Health Aide |
| 0907 | Medical Emergency Technician |
| 0908 | Dietetic Technology |
| 0910 | Orthopedic Assisting |
| 0911 | Optician Technology |
| 0912 | Veterinary Medical Assisting |
| 0913 | Hearing Aid Technology |
| 1.23.99XX | Health Occupations Education, Other |
| 9901 | Health care management |
| 9902 | Health service aide |
| 9903 | Hospital housekeeping |
| 9904 | Hospital ward clerk |
| 9905 | Medical records transcriptionist |

| Code | Descriptive Title |
|---|---|
| 1.24.XXXX | Home Economics |
| 1.24.01XX | Homemaking: Preparation for Personal, Home, and Family Living |
| 0101 | Comprehensive homemaking or home economics |
| 0102 | Child development |
| 0103 | Clothing and textiles |
| 0104 | Consumer education |
| 0105 | Family health |
| 0106 | Family relations |
| 0107 | Foods and nutrition |
| 0108 | Home management |
| 0109 | Housing and home furnishings |
| 1.24.02XX | Occupational Preparation |
| 0201 | Care and guidance of children |
| 0202 | Clothing management, production, and services |
| 0203 | Food management, production, and services |
| 0204 | Home furnishings, equipment, and services |
| 0205 | Institutional and home management and supporting services |

| Code | Descriptive Title |
|---|---|
| 1.25.XXXX | Office Occupations |
| 1.25.01XX | Accounting |
| 0101 | Accounting |
| 0102 | Bookkeeping |
| 0103 | Cashier |
| 0104 | Machine operators: billing, bookkeeping, & computing |
| 0105 | Tellers |
| 0106 | Income tax preparation |
| 1.25.02XX | Business Data Processing Systems |
| 0201 | Computer and console operators |
| 0202 | Peripheral equipment operators |
| 0203 | Programmers |
| 0204 | Systems analysts |
| 1.25.03XX | Filing, Office Machines, and General Office Clerical |
| 0301 | Duplicating machine operators |
| 0302 | File clerks |
| 0303 | General office clerks |
| 1.25.04XX | Information Communication |
| 0401 | Communication systems clerks and operators |
| 0402 | Correspondence clerks |
| 0403 | Mail and postal clerks |
| 0404 | Mail preparing and mail handling machine operators |
| 0405 | Messengers and office aides |
| 0406 | Receptionists and information clerks |

| Code | Descriptive Title |
|---|---|
| 1.25.05XX | Materials Support (Transporting, Storing, and Recording) |
| 0501 | Planning and production clerks |
| 0502 | Quality control clerks |
| 0503 | Shipping and receiving clerks |
| 0504 | Stock and inventory clerks |
| 0505 | Traffic, rate, and transportation clerks |
| 1.25.06XX | Personnel and Training |
| 0601 | Personnel training specialists |
| 0602 | Interviewers and test technicians |
| 0603 | Personnel assistants |
| 1.25.07XX | Stenographic and Secretarial |
| 0701 | Executive secretary |
| 0702 | Secretaries |
| 0703 | Stenographers |
| 0704 | Medical secretary |
| 0705 | Legal secretary |
| 0706 | Court reporting |
| 1.25.08XX | Supervisory and Administrative Management (General Business, etc.) |
| 0801 | Administrative assistants |
| 0802 | Budget management analysis |
| 0803 | Clerical and office supervisors |
| 0804 | Data methods and systems procedures analysts |
| 0805 | Office managers and chief clerks |
| 1.25.09XX | Typing |
| 0901 | Clerk-typists |
| 0902 | Typists |

| Code | Descriptive Title |
|---|---|
| 1.26.XXXX | Trade and Industrial Occupations |
| 1.26.01XX | Air Conditioning and Environmental Control (HARV, etc.) |
| 0101 | Cooling (air conditioning) |
| 0102 | Heating |
| 0103 | Ventilating (Filtering and Humidification) |
| 0104 | Environmental control |
| 1.26.02XX | Appliance Repair |
| 0201 | Electrical appliances |
| 0202 | Gas appliances |
| 1.26.03XX | Automotive Services |
| 0301 | Body and fender |
| 0302 | Mechanics |
| 0303 | Specialization, other |
| 0304 | Service station |
| 1.26.04XX | Aviation |
| 0401 | Air Frame Maintenance |
| 0402 | Aircraft operations |
| 0403 | Ground operations |
| 0404 | Commerical pilot training |
| 0405 | Aviation management and administration |
| 0406 | Power Plant Maintenance |
| 1.26.06XX | Business Machine Maintenance |
| 1.26.07XX | Commercial Art |
| 0701 | Interior decorating |
| 0702 | Window display |
| 0703 | Product design |
| 0704 | Advertising art |
| 0705 | Studio art |

| Code | Descriptive Title |
|---|---|
| 1.26.08XX | Commercial Fishery and Oceanographic |
| 0801 | Seamanship |
| 0802 | Ship and boat operation and maintenance |
| 0803 | Oceanographic |
| 1.26.09XX | Commercial Photography |
| 0901 | Photographic laboratory and darkroom occupations |
| 1.26.10XX | Construction and Maintenance |
| 1001 | Carpentry |
| 1002 | Electricity |
| 1003 | Heavy equipment (construction) |
| 1004 | Masonry |
| 1005 | Painting and decorating |
| 1006 | Plastering |
| 1007 | Plumbing and pipefitting |
| 1008 | Dry wall installation |
| 1009 | Glazing |
| 1010 | Roofing |
| 1011 | Architectural technology |
| 1012 | Civil technology |
| 1013 | Surveying |
| 1.26.11XX | Custodial Services |
| 1.26.12XX | Diesel Mechanic |
| 1.26.13XX | Drafting and Design |
| 1.26.14XX | Electrical |
| 1401 | Industrial electrician |
| 1402 | Lineman |
| 1403 | Motor repairman |
| 1.26.15XX | Electronics |
| 1501 | Communications |
| 1502 | Industrial electronics |
| 1503 | Radio/television |
| 1504 | Electronic technology |
| 1505 | Electromechanical technology |

| Code | Descriptive Title |
|---|---|
| 1.26.16XX | Fabric Maintenance Services |
| 1601 | Drycleaning |
| 1602 | Laundering |
| 1.26.17XX | Foremanship, Supervision and Management Development |
| 1701 | Industrial management and supervision |
| 1.26.19XX | Graphic Arts |
| 1901 | Composition, makeup and typesetting |
| 1902 | Printing press |
| 1903 | Lithography, photography, and platemaking |
| 1904 | Photoengraving |
| 1905 | Silk screen making and printing |
| 1906 | Bookbinding |
| 1907 | Technical illustration |
| 1.26.20XX | Industrial Atomic Energy |
| 2001 | Installation, operation, and maintenance of reactors |
| 2002 | Radiography |
| 2003 | Industrial uses of radioisotopes |
| 1.26.21XX | Instrument Maintenance and Repair |
| 2101 | Instruments (Other than watches and clocks) |
| 2102 | Watchmaking and repair |

| Code | Descriptive Title |
|---|---|
| 1.26.22XX | Maritime Occupations |
| 2201 | Marine propulsion technology |
| 1.26.23XX | Metalworking |
| 2301 | Foundry |
| 2302 | Machine shop |
| 2303 | Machine tool operation |
| 2304 | Metal trades, combined |
| 2305 | Sheet metal |
| 2306 | Welding and cutting |
| 2307 | Tool and die making |
| 2308 | Die sinking |
| 2309 | Metal patternmaking |
| 1.26.24XX | Metallurgy |
| 1.26.25XX | Other Engineering Related Technologies |
| 2501 | Chemical |
| 2502 | Industrial |
| 2503 | Instrumentation |
| 2504 | Mechanical |
| 2505 | Scientific data processing |
| 2506 | Safety |
| 1.26.26XX | Personal Services |
| 2601 | Barbering |
| 2602 | Cosmetology |
| 1.26.27XX | Plastics |
| 1.26.29XX | Quantity Food |
| 2901 | Baker |
| 2902 | Cook-chef |
| 2903 | Meat cutter |
| 2904 | Waiter/Waitress |
| 1.26.31XX | Small Engine Repair, Internal Combustion |

| Code | Descriptive Title |
|---|---|
| 1.26.32XX | Stationary Energy Sources |
| 3201 | Electric Power Generating Plants |
| 3202 | Plumbing Plants |
| 1.26.33XX | Textile Production and Fabrication |
| 3301 | Dressmaking |
| 3302 | Tailoring |
| 1.26.34XX | Leatherworking |
| 3401 | Shoe Manufacturing |
| 3402 | Shoe Repair |
| 1.26.35XX | Upholstering |
| 1.26.36XX | Woodworking Occupations |
| 3601 | Millwork and Cabinet Making |
| 1.26.99XX | Trade and Industrial, Other |
| 9901 | Quality Control and Reliability Technology |
| 9902 | Technical Writing |
| 9903 | Meteorological Analysis |
| 9906 | Manufacturing Technology |
| 9907 | Radio and Television Broadcasting |
| 9908 | Radio and Television Production |

| Code | Descriptive Title |
|---|---|
| 1.27.XXXX | Public Service |
| 1.27.01XX | Fire Science |
| 1.27.02XX | Law Enforcement |
| 0201 | Law Enforcement, General |
| 0202 | Security |
| 0203 | Corrections |
| 0204 | Probation |
| 0205 | Legal Assistant |
| 1.27.03XX | Education (Teacher Aide) |
| 1.27.04XX | Library |
| 1.27.05XX | Audio-Visual (Multi-Media) |
| 1.27.06XX | Recreation |
| 1.27.07XX | Social Service (Work) |
| 1.27.08XX | Public Administration |
| 1.27.09XX | Urban, Rural, and Community Development Services |
| 1.27.10XX | Resources Management Services |
| 1001 | Air Pollution Control |
| 1002 | Environmental Pollution Control |
| 1003 | Water and Waste Water Treatment |
| 1004 | Environmental Science |
| 1005 | Environmental Marine Science |
| 1.27.11XX | Music, Dance and Theatre |
| 1101 | Music |
| 1102 | Dance |
| 1103 | Theatre |

# APPENDIX B

## OTHER REPORTS

The following pages contain reports and references to reports which are collected from community colleges by other Divisions in the Department of Education, other State agencies, and others. Because of the magnitude of these reports, copies of most of them are not included in this Appendix. However, they are listed by name and described in some instances. Copies will be provided on request.

| Obtained by | Report No. | Report Title | Due Date or Frequency | Page |
|---|---|---|---|---|
| Office of Education Facilities | CO-1(OEFC 304) | Annual and Five-Year Capital Projects Program Plans | 11-1 | B.7 |
| | CO-2(OEFC 352) | Six-Month Capital Outlay Encumbrance Projection and Request for Encumbrance Authorization | 7-15, 10-15<br>1-15, 4-15 | B.22 |
| | CO-3(OEFC 351) | Quarterly Report: Capital Outlay Funds | 7-15, 10-15<br>1-15, 4-15 | B.24 |
| | CO-4(OEFC 217) | Project Priority List | As Required | B.31 |
| | CO-5(OEFC 218) | Site Inspection | As Required | B.34 |
| | CO-6(OEFC 093) | Resolution Requesting an Educational Plant Survey | As Required | B.36 |
| | CO-7(OEFC 092) | Application for Advance Funding | As Required | B.37 |
| | CO-8(SCOA-1) | Local Resolution Requesting Issuance of State Board of Education Capital Outlay Bonds | As Required | |
| | CO-9(OEFC 207) | Comprehensive Safety Inspection | 6-30 | B.43 |
| D.O.E. Comptroller | FA-397 (VEDS-NCES Form 2404-2) | Expenditures of State and Local Funds for Vocational Education | 10-15 | B.46 |
| | FA-396 | Cash Advance Request | Quarterly | B.48 |
| | FA-399 | Budget Recapitulation and/or Project Expenditure Report | Monthly | B.50 |
| | FA-400 | Monthly Report of Financial Transactions for CETA Funds | Monthly | B.52 |
| Division of Public Schools | ESE 333 | Adult Education Annual Report | 8-15 | B.53 |

| Obtained by | Report No. | Report Title | Due Date or Frequency | Page |
|---|---|---|---|---|
| Division Vocational Education | DVE 007 | IMTS Personal Data Form/ Prescription Data Form | As Appropriate | |
| | DVE 036 | Student CAPS Registration | As Appropriate | |
| | DVE 393 | Annual Cosmetology Educational Report | 1-31 | B.64 |
| | DVE 429 | CETA Special Project Grant | As Appropriate | B.66 |
| | DVE 435 | DVE Impact Assessment | As Appropriate | |
| | DVE 505 | Instructional Materials Survey | 11-15 | |
| | DVE 516 | State Approval as Training Agency for Veterans | As Required | |
| | ESE 424 | Occupational Proficiency Program Final Class Report | As Appropriate | |
| Instructional Television and Radio | ITV-1 (CE 126) | Scheduling of Videotapes | Annually | B.67 |
| | | ITV&R OCO Equipment Grants | Annually | |
| Florida Community Activities Association | | FCCAA Survey of Athletic Financial Assistance | Annually | |
| Center for Career Development Services | | Survey: Vital Information for Education | Annually | |

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| Obtained by | Report No. | Report Title | Due Date or Frequency | Page |
|---|---|---|---|---|
| | | HIGHER EDUCATION GENERAL INFORMATION SURVEY (HEGIS) | | |
| U.S. Department of Education (NCES) | 2300-1 | Institutional Characteristics of Colleges and Universities | 7-1 | B.68 |
| | 2300-2.1 | Degrees and Other Formal Awards Conferred | 9-15 | B.68 |
| | 2300-2.3 | Fall Enrollment and Compliance Report | 10-1 | B.68 |
| | 2300-2.8 | Residence and Migration of College Students | 11-1 | B.68 |
| | 2300-3 | Salaries, Tenure, and Fringe Benefits of Full-Time Instructional Faculty | 10-15 | B.69 |
| | 2300-4 | Financial Statistics of Institutions of Higher Education | 10-15 | B.69 |
| | 2300-5 | College and University Libraries | 9-15 | B.69 |
| | 2300-7 | Inventory of College and University Physical Facilities | 9-15 | |
| | 2300-8 | Adult/Continuing Education: Non-Credit Activities | 8-15 | B.69 |
| | | OFFICE FOR CIVIL RIGHTS - ANNUAL SURVEY OF PROGRESS IN IMPLEMENTING STATE-WIDE PLANS (THE OCR SURVEY) | | |
| U.S. Department of Education | EEO-6 | Higher Education Staff Information | 12-5 | B.70 |
| | Alb | New Employees in Institutions of Higher Education | 12-5 | B.70 |
| | A2 | Employees of State Agencies of Higher Education | 12-5 | B.70 |
| | A3 | Employee Retirements Resignations and Dismissals | 12-5 | B.71 |
| | A4 | Employee Promotions | 12-5 | B.71 |
| | A5 | Compositions of Governing Boards for Higher Education | 12-5 | B.71 |

| Obtained by | Report No. | Report Title | Due Date or Frequency | Page |
|---|---|---|---|---|
| | OFFICE FOR CIVIL RIGHTS - ANNUAL SURVEY OF PROGRESS IN IMPLEMENTING STATE-WIDE PLANS (THE OCR SURVEY) (Continued) | | | |
| U.S. Department of Education | B1 | Applications, Acceptances, and Actual Enrollment | 12-5 | B.71 |
| | 2300-2.3 | Fall Enrollment and Compliance Report | 10-1 | B.71 |
| | B3 | Financial Assistance to Students | 12-5 | B.71 |
| | 2300-2.1 | Degrees and Other Formal Awards Conferred | 9-15 | B.71 |
| Department of Labor and Employment Security | UCT-6R | Reimbursable Employers Quarterly Report | Quarterly | |
| Florida Retirement System | FRSM30 | Florida Retirement System Payroll Report | Monthly | |
| Department of Revenue | DR-15 | Sales and Use Tax Report | Monthly | |
| Internal Revenue | | Federal Income Tax Withheld | Quarterly | |
| | W-3 | Transmittal of Income and Tax Statements | Annually | |
| U.S. Department of Education | DFAFS27 | HEW Department Federal Assistance Financing System Recipient Report of Expenditures | Quarterly | |
| | OE Form 646 | Fisal Operations Report and Application to Participate in Federal Student Financial Aid Programs | Annually | |
| | OE Form 574 | National Direct Student Loan Program: Report of Defaulted Loans | Quarterly | |
| | | Institutional Progress Report of BEOG | Quarterly | |
| | OE Form 1072 | Student Confirmation Report | On Request | |

B.7

FLORIDA DEPARTMENT OF EDUCATION

OFFICE OF EDUCATIONAL FACILITIES CONSTRUCTION

# ANNUAL AND FIVE-YEAR
# CAPITAL PROJECTS PROGRAM PLANS

ANNUAL PLAN: 1979-80
FIVE -YEAR PLAN: 1980-81 THROUGH 1984-85

Signature of Preparer ______________________ Signature of President or Designee ______

Telephone of Preparer (     ) ______________________ Date of Signature ______________

College ______________________________

OEFC 304 (CO-1)
Exp. 9/1/80

## INSTRUCTIONS

This report is to be completed, signed and dated, then submitted by November 1, 1979, to the Facilities Development and Evaluation Section, Office of Educational Facilities Construction, Florida State Department of Education, Tallahassee, Florida 32301. Appropriate pages may be duplicated where additional pages are needed.

## SECTION A: ANNUAL PLAN

### Part A-1:

I. Enter by fund source and as total of all funds all capital outlay funds brought forward from previous years as either encumbered or unencumbered as of June 30, 1979. Encumbered amounts are those set aside or reserved in accounting records to cover specific purchase orders or contracts currently in effect and unpaid. All other amounts are unencumbered. PEBA/PECO funds to which a district is entitled but which have not been recorded as revenue are to be included in unencumbered.

Funds from special allocations of PEBA/PECO and allocations for cooperative educational facilities (Chapter 235.195 Florida Statutes) and for community educational facilities (Chapter 235.211(2)F.S.) are to be included as part of the PEBA/PECO funds for the year in which the allocation was made. PEBA/PECO funds for library books are not to be included. PEBA/PECO Loans are not to be included in Section A, Part A-1; they are to be entered in Section A, Part A-2.

The combined encumbered and unencumbered amounts for each fund source should agree with the fund balance indicated in the Annual Financial Report (AFR) Summary of Plant Fund Operations (Schedule 6) except for SBE Bonds and PEBA/PECO Advances on Bonds. The amounts indicated as SBE Bonds Payable and PEBA/PECO Advances Payable in the Liabilities section of the Annual Financial Report (AFR) Balance Sheet (Exhibit A, Part 2) are to be reflected in the fund source columns for SBE Bonds and the appropriate year of PEBA/PECO.

The amount shown as encumbered (Line 1) in the Total Column should equal the Funds Restricted for Encumbrances indicated in the Annual Financial Report (AFR) Balance Sheet (Exhibit A, Part 2).

The amount shown as unencumbered (Line 2) in the Total Column should reflect the combined Fund Balances, Restricted and Fund Balances, Unrestricted indicated in the Annual Financial Report (AFR) Balance Sheet (Exhibit A, Part 2) appropriately modified by the amounts of SBE Bonds Payable and/or PEBA/PECO Advances Payable.

Enter by fund source and as total of all funds the new capital outlay funds available for 1979-80. The amount of new PEBA/PECO funds available can be obtained from the Facilities Development & Evaluation Section of the Office of Educational Facilities Construction. The amounts of new CO and DS and SBE Bonds funds available can be obtained from the Capital Outlay and Debt Service of the OEFC.

Line 4 = 1 + 2 + 3

II. Enter by fund source and as total of all funds the estimated amounts which will be encumbered in 1979-80 from the unencumbered funds brought forward from previous years and from the new cpaital outlay funds for 1979-80.

Line 5 must be part of or all of but no greater than Line 2.

Line 6 must be part of or all of but no greater than Line 3.

Line 7 = 5 + 6

III. Enter by fund source and as total of all funds the estimated disbursements for 1979-80 from the capital outlay funds brought forward from previous years and from the new capital outlay funds for 1979-80.

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Line 8 must be part of or all of but not greater than the combination of Lines 1 + 5.

Line 9 must be part of or all of but no greater than Line 6.

Line 10 = 8 + 9

IV. Enter by fund source and as total of all funds the estimated capital outlay funds available June 30, 1980 as encumbered and/or unencumbered from capital outlay funds brought forward from previous years and from new capital outlay funds for 1979-80.

Line 11 = 1 + 5 - 8

Line 12 = 2 - 5

Line 13 = 6 - 9

Line 14 = 3 - 6

Line 15 = 11 + 12 + 13 + 14

Part A-2:

Enter information concerning PEBA/PECO Loans pursuant to Chapter 235.221 F. S. in accordance with the instructions for Part A-1. Indicate the date of issue for each loan.

Part A-3:
Each project planned for the year is to be reported separately. At least ten percent of the annual PEBA/PECO allocation must be expended for correcting safety-to-life deficiencies pursuant to Chapter 235.435(3)(a) F. S. No library book projects are to be included.

Col. 1: List projects in order of preference as established by the college.

Col. 2: Define the project as it is described in the Project Priority List (PPL) approved by the State Board of Education. Specify the PPL number and identify the date of the Educational Plant Survey or Survey Ammendment in which the project was recommended. Indicate the total anticipated final project cost for all phases of the project for all years of the project. With the exception of safety-to-life projects, only projects that are survey recommended may be listed.

Col. 3: List the amounts estimated to be encumbered during the year by project phase: site, planning, construction, equipment.

Col. 4: List funds available for the project phase from sources other than the PEBA/PECO allocation of the year. PEBA/PECO Advances on Bonds and PEBA/PECO Loans are to be included here. Identify the fund sources.

Col. 5: List the funds required for the project phase from the PEBA/PECO allocation for the year.

Col. 6: Enter the estimated date of encumbrance for the project phase.

SECTION B: FIVE-YEAR PLAN
Complete one part of Section B for each fiscal year of the Five-Year Plan, 1980-81 through 1984-85. Instructions are the same as for Section A, Part A-3.

SECTION C: COST ANALYSIS
Col. 1: Enter the estimated encumbrances for 1979-80 from all funds available. Group the encumbrances for all projects by project phase category. The total of this column is equal to the sum of Section A, Part A-1, Total Column, Line 7 plus Section A, Part A-2, Total Column, Line 7. The total for this column also is equal to the total of the estimated encumbrances for all project phases of all projects listed in Section A, Part A-3, Column 3.

Col. 2: Enter the estimated encumbrances for 1980-81 from unencumbered funds brought forward and estimated to be available as of June 30, 1980. Group the encumbrances for all projects by project phase category. The total for this column is equal to or less than the sum of Section A, Part A-1, Total Column, Line 12 + Line 14 plus Section A, Part A-2, Total Column, Line 12 + Line 14.

Col. 3: Enter the estimated encumbrances for 1980-81 from new capital outlay funds anticipated for 1980-81. Group the encumbrances for all projects by project phase category.

Col. 4: Enter the total for each project phase category of the estimated encumbrances for 1980-81 from funds estimated to be available and funds anticipated. The total for this column is equal to the total of the estimated encumbrances for all project phases of all projects listed in Section B, Part B-1, Column 3.

## SECTION D: SQUARE FOOTAGE ANALYSIS

Col. 1: Enter the assignable square feet (ASF) of existing space in the Facilities Inventory as of June 30, 1979. Aggregate the square footages by space use category.

Col. 2: Enter the assignable square feet (ASF) to be constructed from estimated encumbrances made for projects during 1979-80. Aggregate the square footages by space use category. These square footages reflect the space to be built from estimated encumbrances indicated in Section A, Part A-1, Line 7; Section A, Part A-2, Line 7; Section A, Part A-3, Column 3; and Section C, Column 1.

Col. 3: Enter the assignable square feet (ASF) to be constructed from estimated encumbrances made for projects during 1980-81. Aggregate the square footages by space use category. These square footages reflect the space to be built from estimated encumbrances of estimated unencumbered funds indicated in Section A, Part A-1, Line 12 + Line 14 and Section A, Part A-2, Line 12 + Line 14 and from estimated encumbrances of new capital outlay funds anticipated for 1980-81. These square footages also reflect the space to be built from estimated encumbrances indicated in Section B, Part B-1, Column 3 and Section C, Column 4.

Col. 4: Enter the total assignable square feet (ASF) for each space use category of existing space and space to be constructed from estimated encumbrances made for projects by June 30, 1981.

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College

Section A: Annual Plan
Part A-1: Capital Outlay Funds
Encumbrances, Disbursements and Balances
Through June 30, 1980

| | LINE | Fund Sources | | | | | |
|---|---|---|---|---|---|---|---|
| | | Total of All Funds | CO & DS (License Tags) | SBE Bonds (CO Bonds) | 1979-80 PEBA/PECO | 1978-79 PEBA/PECO | 1977-78 PEBA/PECO |
| I. Capital Outlay Funds Available for 1979-80 | | | | | | | |
| A. From Capital Outlay Funds Brought Forward from Previous Years | | | | | | | |
| 1. Encumbered as of June 30, 1979 | 1 | ____ | ____ | ____ | | ____ | ____ |
| 2. Unencumbered as of June 30, 1979 | 2 | ____ | ____ | ____ | | ____ | ____ |
| B. From New Capital Outlay Funds for 1979-80 | 3 | ____ | ____ | ____ | ____ | | |
| Total Capital Outlay Funds Available for 1979-80 | 4 | ____ | ____ | ____ | ____ | ____ | ____ |
| II. Estimated Encumbrances for 1979-80 | | | | | | | |
| A. From Unencumbered Funds Brought Forward from Previous Years | 5 | ____ | ____ | ____ | | ____ | ____ |
| B. From New Capital Outlay Funds for 1979-80 | 6 | ____ | ____ | ____ | ____ | | |
| Total Estimated Encumbrances for 1979-80 | 7 | ____ | ____ | ____ | ____ | ____ | ____ |
| III. Estimated Disbursements for 1979-80 | | | | | | | |
| A. From Capital Outlay Funds Brought Forward from Previous Years | 8 | ____ | ____ | ____ | | ____ | ____ |
| B. From New Capital Outlay Funds for 1979-80 | 9 | ____ | ____ | ____ | ____ | | |
| Total Estimated Disbursements for 1979-80 | 10 | ____ | ____ | ____ | ____ | ____ | ____ |
| IV. Estimated Capital Outlay Funds Available June 30, 1980 | | | | | | | |
| A. From Capital Outlay Funds Brought Forward from Previous Years | | | | | | | |
| 1. Encumbered as of June 30, 1980 | 11 | ____ | ____ | ____ | | ____ | ____ |
| 2. Unencumbered as of June 30, 1980 | 12 | ____ | ____ | ____ | | ____ | ____ |
| B. From New Capital Outlay Funds for 1979-80 | | | | | | | |
| 1. Encumbered as of June 30, 1980 | 13 | ____ | ____ | ____ | ____ | | |
| 2. Unencumbered as of June 30, 1980 | 14 | ____ | ____ | ____ | ____ | | |
| Total Estimated Capital Outlay Funds Available June 30, 1980 | 15 | ____ | ____ | ____ | ____ | ____ | ____ |

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______________________________
College

### Section A: Annual Plan
### Part A-1: Capital Outlay Funds
### Encumbrances, Disbursements and Balances
### Through June 30, 1980

| | LINE | Fund Sources | | | | | |
|---|---|---|---|---|---|---|---|
| | | 1976-77 PEBA/PECO | 1975-76 PEBA/PECO | 1974-75 HEBA | Federal Funds | Local Funds | Other Funds |
| I. Capital Outlay Funds Available for 1979-80 | | | | | | | |
| A. From Capital Outlay Funds Brought Forward from Previous Years | | | | | | | |
| 1. Encumbered as of June 30, 1979 | 1 | | | | | | |
| 2. Unencumbered as of June 30, 1979 | 2 | | | | | | |
| B. From New Capital Outlay Funds for 1979-80 | 3 | | | | | | |
| Total Capital Outlay Funds Available for 1979-80 | 4 | | | | | | |
| II. Estimated Encumbrances for 1979-80 | | | | | | | |
| A. From Unencumbered Funds Brought Forward from Previous Years | 5 | | | | | | |
| B. From New Capital Outlay Funds for 1979-80 | 6 | | | | | | |
| Total Estimated Encumbrances for 1979-80 | 7 | | | | | | |
| III. Estimated Disbursements for 1979-80 | | | | | | | |
| A. From Capital Outlay Funds Brought Forward from Previous Years | 8 | | | | | | |
| B. From New Capital Outlay Funds for 1979-80 | 9 | | | | | | |
| Total Estimated Disbursements for 1979-80 | 10 | | | | | | |
| IV. Estimated Capital Outlay Funds Available June 30, 1980 | | | | | | | |
| A. From Capital Outlay Funds Brought Forward from Previous Years | | | | | | | |
| 1. Encumbered as of June 30, 1980 | 11 | | | | | | |
| 2. Unencumbered as of June 30, 1980 | 12 | | | | | | |
| B. From New Capital Outlay Funds for 1979-80 | | | | | | | |
| 1. Encumbered as of June 30, 1980 | 13 | | | | | | |
| 2. Unencumbered as of June 30, 1980 | 14 | | | | | | |
| Total Estimated Capital Outlay Funds Available June 30, 1980 | 15 | | | | | | |

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______________________________
College

### Section A: Annual Plan
### Part A-2: PEBA/PECO Loans
### Encumbrances, Disbursements and Balances
### Through June 30, 1980

| | LINE | PEBA/PECO Loans | | | |
|---|---|---|---|---|---|
| | | Total of All Loans | Date of Issue: | Date of Issue: | Date of Issue: |
| I. Capital Outlay Funds Available for 1979-80 | | | | | |
| A. From Capital Outlay Funds Brought Forward from Previous Years | | | | | |
| 1. Encumbered as of June 30, 1979 | 1 | | | | |
| 2. Unencumbered as of June 30, 1979 | 2 | | | | |
| B. From New Capital Outlay Funds for 1979-80 | 3 | | | | |
| Total Capital Outlay Funds Available for 1979-80 | 4 | | | | |
| II. Estimated Encumbrances for 1979-80 | | | | | |
| A. From Unencumbered Funds Brought Forward from Previous Years | 5 | | | | |
| B. From New Capital Outlay Funds for 1979-80 | 6 | | | | |
| Total Estimated Encumbrances for 1979-80 | 7 | | | | |
| III. Estimated Disbursements for 1979-80 | | | | | |
| A. From Capital Outlay Funds Brought Forward from Previous Years | 8 | | | | |
| B. From New Capital Outlay Funds for 1979-80 | 9 | | | | |
| Total Estimated Disbursements for 1979-80 | 10 | | | | |
| IV. Estimated Capital Outlay Funds Available June 30, 1980 | | | | | |
| A. From Capital Outlay Funds Brought Forward from Previous Years | | | | | |
| 1. Encumbered as of June 30, 1980 | 11 | | | | |
| 2. Unencumbered as of June 30, 1980 | 12 | | | | |
| B. From New Capital Outlay Funds for 1979-80 | | | | | |
| 1. Encumbered as of June 30, 1980 | 13 | | | | |
| 2. Unencumbered as of June 30, 1980 | 14 | | | | |
| Total Estimated Capital Outlay Funds Available June 30, 1980 | 15 | | | | |

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Section A: Annual Plan
Part A-3: Capital Outlay Encumbrance Projection by Project
Fiscal Year 1979-80

Page ____ of _____

College _______________

| (1) College Preference Number | (2) Project Description | (3) Estimated Encumbrance for the Year by Project Phase | (4) Funds Available from Other Sources | (5) Funds Required from New PEBA/PECO | (6) Estimated Date of Encumbrance |
|---|---|---|---|---|---|
| | | ______ Site | ______ | ______ | ______ |
| | | ______ Planning | ______ | ______ | ______ |
| | | ______ Construction | ______ | ______ | ______ |
| | | ______ Equipment | ______ | ______ | ______ |
| | Anticipated Final Project Cost | | | | |
| | | ______ Site | ______ | ______ | ______ |
| | | ______ Planning | ______ | ______ | ______ |
| | | ______ Construction | ______ | ______ | ______ |
| | | ______ Equipment | ______ | ______ | ______ |
| | Anticipated Final Project Cost | | | | |
| | | ______ Site | ______ | ______ | ______ |
| | | ______ Planning | ______ | ______ | ______ |
| | | ______ Construction | ______ | ______ | ______ |
| | | ______ Equipment | ______ | ______ | ______ |
| | Anticipated Final Project Cost | | | | |

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Section B: Five-Year Plan
Part B-1: Capital Outlay Encumbrance Projection by Project
and Request for Legislative Appropriation
Fiscal Year 1980-81

Page ____ of ____

____________________
College

| (1) | (2) | (3) | (4) | (5) | (6) |
|---|---|---|---|---|---|
| College Preference Number | Project Description | Estimated Encumbrance for the Year by Project Phase | Funds Available from Other Sources | Funds Required from New PEBA/PECO | Estimated Date of Encumbrance |
| | | ________ Site | ________ | ________ | ________ |
| | | ________ Planning | ________ | ________ | ________ |
| | | ________ Construction | ________ | ________ | ________ |
| | Anticipated Final Project Cost | ________ Equipment | ________ | ________ | ________ |
| | | ________ Site | ________ | ________ | ________ |
| | | ________ Planning | ________ | ________ | ________ |
| | | ________ Construction | ________ | ________ | ________ |
| | Anticipated Final Project Cost | ________ Equipment | ________ | ________ | ________ |
| | | ________ Site | ________ | ________ | ________ |
| | | ________ Planning | ________ | ________ | ________ |
| | | ________ Construction | ________ | ________ | ________ |
| | Anticipated Final Project Cost | ________ Equipment | ________ | ________ | ________ |

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Section B: Five-Year Plan
Part B-2: Capital Outlay Encumbrance Projection by Project
and Request for Legislative Appropriation
Fiscal Year 1981-82

Page ____ of ____

College

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| (1) College Preference Number | (2) Project Description | (3) Estimated Encumbrance for the Year by Project Phase | (4) Funds Available from Other Sources | (5) Funds Required from New PEBA/PECO | (6) Estimated Date of Encumbrance |
|---|---|---|---|---|---|
| | | Site | | | |
| | | Planning | | | |
| | | Construction | | | |
| | Anticipated Final Project Cost | Equipment | | | |
| | | Site | | | |
| | | Planning | | | |
| | | Construction | | | |
| | Anticipated Final Project Cost | Equipment | | | |
| | | Site | | | |
| | | Planning | | | |
| | | Construction | | | |
| | Anticipated Final Project Cost | Equipment | | | |

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Section B: Five-Year Plan
Part B-3: Capital Outlay Encumbrance Projection by Project
and Request for Legislative Appropriation
Fiscal Year 1982-83

Page ____ of ____

____________________
College

| (1) College Preference Number | (2) Project Description | (3) Estimated Encumbrance for the Year by Project Phase | (4) Funds Available from Other Sources | (5) Funds Required from New PEBA/PECO | (6) Estimated Date of Encumbrance |
|---|---|---|---|---|---|
| | | Site | | | |
| | | Planning | | | |
| | | Construction | | | |
| | Anticipated Final Project Cost | Equipment | | | |
| | | Site | | | |
| | | Planning | | | |
| | | Construction | | | |
| | Anticipated Final Project Cost | Equipment | | | |
| | | Site | | | |
| | | Planning | | | |
| | | Construction | | | |
| | Anticipated Final Project Cost | Equipment | | | |

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Section B: Five-Year Plan
Part B-4: Capital Outlay Encumbrance Projection by Project
and Request for Legislative Appropriation
Fiscal Year 1983-84

Page ____ of ____

______________________
College

| (1) | (2) | (3) | (4) | (5) | (6) |
|---|---|---|---|---|---|
| College Preference Number | Project Description | Estimated Encumbrance for the Year by Project Phase | Funds Available from Other Sources | Funds Required from New PEBA/PECO | Estimated Date of Encumbrance |
| | | Site | | | |
| | | Planning | | | |
| | | Construction | | | |
| | Anticipated Final Project Cost | Equipment | | | |
| | | Site | | | |
| | | Planning | | | |
| | | Construction | | | |
| | Anticipated Final Project Cost | Equipment | | | |
| | | Site | | | |
| | | Planning | | | |
| | | Construction | | | |
| | Anticipated Final Project Cost | Equipment | | | |

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Section B: Five-Year Plan
Part B-5: Capital Outlay Encumbrance Projection by Project
and Request for Legislative Appropriation
Fiscal Year 1984-85

Page ____ of ____

______________________________
College

| (1) | (2) | (3) | (4) | (5) | (6) |
|---|---|---|---|---|---|
| College Preference Number | Project Description | Estimated Encumbrance for the Year by Project Phase | Funds Available from Other Sources | Funds Required from New PEBA/PECO | Estimated Date of Encumbrance |
| | | Site | | | |
| | | Planning | | | |
| | | Construction | | | |
| | Anticipated Final Project Cost | Equipment | | | |
| | | Site | | | |
| | | Planning | | | |
| | | Construction | | | |
| | Anticipated Final Project Cost | Equipment | | | |
| | | Site | | | |
| | | Planning | | | |
| | | Construction | | | |
| | Anticipated Final Project Cost | Equipment | | | |

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## Section C: Cost Analysis
## of Section A and Section B, Part B-1
## Through June 30, 1981

College

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| | (1) | (2) | (3) | (4) |
|---|---|---|---|---|
| Project Phase Category | Estimated Encumbrances for All Projects for 1979-80 by Project Phase Category from All Funds Available | Estimated Encumbrances for All Projects for 1980-81 by Project Phase Category | | |
| | | From Unencumbered funds brought forward and estimated to be available as of June 30,1980 | From new capital outlay funds anticipated for 1980-81 | Totals from funds available and funds anticipated |
| Site | | | | |
| Planning | | | | |
| Construction | | | | |
| Equipment | | | | |
| Total Estimated Encumbrances | | | | |

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## Section D: Square Footage Analysis of Existing Space and Encumbered Projects Through June 30, 1981

College ____________________

| Space Use Category | (1) ASF in Inventory as of June 30, 1979 by Space Use Category | (2) ASF from Encumbrances for Projects During 1979-80 by Space Use Category | (3) ASF from Encumbrances for Projects During 1980-81 by Space Use Category | (4) ASF Totals as of June 30, 1981 by Space Use Category |
|---|---|---|---|---|
| Instructional: | | | | |
| Classrooms | ______ | ______ | ______ | ______ |
| Academic Laboratories | ______ | ______ | ______ | ______ |
| Occupational Laboratories | ______ | ______ | ______ | ______ |
| Physical Education | ______ | ______ | ______ | ______ |
| Instructional Support: | | | | |
| Libraries | ______ | ______ | ______ | ______ |
| Audio/Visual | ______ | ______ | ______ | ______ |
| Auditorium/Exhibition | ______ | ______ | ______ | ______ |
| Institutional Support: | | | | |
| Student Services | ______ | ______ | ______ | ______ |
| Offices | ______ | ______ | ______ | ______ |
| Support Services | ______ | ______ | ______ | ______ |
| Total ASF | | | | |

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FLORIDA DEPARTMENT OF EDUCATION
OFFICE OF EDUCATIONAL FACILITIES CONSTRUCTION

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Six Month Capital Outlay Encumbrance Projection and Request for Encumbrance Authorization

Agency or District:____________________

Six Month Period of Projection:____________________

| (1) | | (2) | (3) | (4) | (5) | (6) | (7) | (8) |
|---|---|---|---|---|---|---|---|---|
| Project Identification | | Projected Phase to be Encumbered | Estimated Date and Total Cost of Encumbrance | Amount by Fund Source and Classification from Form OEFC 351 | | | | Remarks |
| | | | | | Amount to be Encumbered | | | |
| | | | | | End Prior Quarter | | Current or Next Quarter | |
| Project Number | Description | | | Fund Source | Reserved for Required Expenditure | Unencumbered, Unreserved Balance | Additional Funds Available | |
| | | | | | | | | |
| TOTALS (Last Page Only) | | ▨ | | ▨ | | | | ▨ |

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Exp. 7/31/81

(Instructions on reverse)

Signature____________________ Date__________

## INSTRUCTIONS

This quarterly projection and request provides a six month period projection of capital outlay encumbrances and requests Encumbrance Authorization from the Office of Educational Facilities Construction (OEFC) for use of Public Education Bond Amendment funds. An additional use of the information provided in this report is to forecast the need for bond sales and to manage PEBA Trust Funds so that funds will be available when needed by districts and agencies. This form should be completed and returned to the Office of Educational Facilities Construction, Knott Building, Tallahassee, Florida 32301, by the fifteenth day after the end of each fiscal quarter. This form should be signed by the Chancellor, Division Director, or Superintendent.

| | |
|---|---|
| Agency or District Reporting: | List the name of the agency or district for which the projection and request is submitted. Districts receiving funds for a separate type of project such as Area Vocational-Technical Centers should complete separate forms. |
| Six Month Period of Projection: | List the beginning and ending dates of the six month period for which the projection is made. |
| **Column 1** | |
| Project Identification: | School districts and community college districts should list the project priority list number and the Board of Regents should use their project identification number. A project is the item for which a contract is executed, or an item for which a purchase order or work order is issued. |
| **Column 2** | |
| Projected Phase to be Encumbered: | Identify the phase of the project for which the encumbrance will be made in one of the two following categories: (1) planning, and (2) construction. |
| **Column 3** | |
| Estimated Date and Total Cost of Encumbrance: | Estimate the date of issue for the contract, purchase order, or work order. List below the date, on the next line, the total estimated cost of this phase of the project. |
| **Column 4** | |
| Fund Source: | List fund sources separately to be used in this phase of the project. Fund sources should correspond with column headings for fund sources on form OEFC 351. Do not list amounts of funds in this column. |
| **Columns 5, 6, 7** | |
| Amount: | List the amount required separately for each fund source for this phase of the project in the appropriate column, or columns. Amounts listed for projects to be financed from funds remaining at the end of the prior quarter should be classified as listed on form OEFC 351 as "Reserved for Required Expenditure" or "Unencumbered, Unreserved Balance". Other amounts would be projected to be received in the current quarter, or next quarter and would be classified as "Additional Funds Available" which is the classification in which these funds will be reported on form OEFC 351 in the future. Amounts in parentheses indicate a minus. The amount of PECO funds listed by year in columns five (5) six (6) and seven (7) is the amount for which Encumbrance Authorizations are being requested from the Office of Educational Facilities Construction. |
| **Column 8** | |
| Remarks: | Use this column to provide a pertinent data that might affect any of the previous information, or which would indicate any priorities that should be considered. Indicate if an Encumbrance Authorization for PECO funds on the project has been received. Attach additional information if necessary. |

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
An equal opportunity employer

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## FLORIDA DEPARTMENT OF EDUCATION
## OFFICE OF EDUCATIONAL FACILITIES CONSTRUCTION
## QUARTERLY REPORT: CAPITAL OUTLAY FUNDS

**GENERAL INSTRUCTIONS**

This report should be submitted according to the following schedule to the Florida Department of Education, Office of Educational Facilities Construction, Capital Outlay and Debt Service Section, Tallahassee, Florida 32304. BE SURE TO SIGN AND DATE THIS FORM BELOW FOR EACH QUARTERLY SUBMISSION.

| Due | For |
|---|---|
| October 15, 1980 | First Quarter ending September 30, 1980 |
| January 15, 1981 | Second Quarter ending December 31, 1980 |
| April 15, 1981 | Third Quarter ending March 31, 1981 |
| July 15, 1981 | Fourth Quarter ending June 30, 1981 |

Please contact Harry Dean, Capital Outlay and Debt Service Section, 904/487-2575 if there are any questions.

| | | | |
|---|---|---|---|
| Preparer's Signature | Preparer's Telephone<br>(   ) | President or Designee Signature | Signature Dated |

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## INSTRUCTIONS, PAGE 2

**NOTE: All funds on this page are Capital Outlay Funds and will be typically accounted for on a CASH BASIS as defined in "Additional Funds Available in Quarter".**

### DEFINITIONS

| | |
|---|---|
| **Encumbered – (Lines 3, 9, 15, 21, 27):** | Amounts set aside or reserved in accounting records to cover specific purchase orders, or contracts currently in effect and unpaid. |
| **Reserved for Required Expenditure – (Lines 4, 10, 16, 22, 28):** | Funds currently available, but limited by law or SBE rule in their application so that they must be held for a specific project for encumbrance at a later date. For example, capital outlay bond proceeds are limited to specific projects in the bond resolution. Ten percent of PECO entitlement required to be expended on Safety-to-Life projects should be included in this classification. Funds for encumbrance authorizations received but not encumbered would be another example. |
| **Unencumbered, Unreserved Balance – (Lines 5, 11, 17, 23, 29):** | Available funds that are unencumbered, unreserved, or unappropriated and may be applied to any authorized project. |
| **Additional Funds Available in Quarter – (Lines 6, 12, 18, 24):** | The receipt of new or additional funds since the prior quarter. Funds on page two will be typically accounted for on a CASH BASIS, that is recorded when cash, revenue or funds are actually received. In the case of bond issues, use the date of sale as the date when funds are received. |
| **Encumbered in Quarter (Estimated) – (Lines 7, 13, 19, 25):** | Estimated amounts set aside or reserved in accounting records during the quarter in order to cover specific purchase orders, or contracts currently in effect. All funds are considered to be encumbered before expenditure for purposes of this report. |
| **Expended in Quarter – (Lines 8, 14, 20, 26):** | Funds that are spent as reported in your accounting records. |

### COMPUTING INSTRUCTIONS

| | |
|---|---|
| **Current Annual Budget – (Line 1):** | Record the most recent annual budget data available at the time of each report. These data are not used in balancing with data reported on lines 2–30 below. |
| **Total – Capital Outlay Funds – (Lines 2 and 30):** | Lines 3, 4, 5 equal line 2. (For Balance Forward use actual data from Annual Financial Report, if available.)<br>Lines 27, 28, 29 equal line 30. |
| **FIRST QUARTER:** | Transactions for First Quarter listed on lines 6, 7, and 8 update lines 3, 4, and 5 in Balance Forward to yield First Quarter ending balances on lines 9, 10, and 11.<br>(1) Line 2 (or lines 3, 4, and 5), plus line 6, less line 8, equals lines 9, 10, and 11.<br>(2) Line 3, plus line 7, less line 8, equals line 9. |
| **SECOND QUARTER:** | Transactions for Second Quarter listed on lines 12, 13, and 14 update lines 9, 10, and 11, for First Quarter to yield Second Quarter ending balances on lines 15, 16, and 17.<br>(1) Lines 9, 10, and 11, plus line 12, less line 14, equals lines 15, 16, and 17.<br>(2) Line 9, plus line 13, less line 14, equals line 15. |
| **THIRD QUARTER:** | Transactions for Third Quarter listed on lines 18, 19, and 20 update lines 15, 16, and 17 for Second Quarter to yield Third Quarter ending balances on lines 21, 22, and 23.<br>(1) Lines 15, 16, and 17, plus line 18, less line 20, equals lines 21, 22, and 23.<br>(2) Line 15, plus line 19, less line 20, equals line 21. |
| **FOURTH QUARTER:** | Transactions for Fourth Quarter listed on lines 24, 25, and 26 update lines 21, 22, and 23 for Third Quarter to yield Fourth Quarter ending balances on lines 27, 28, and 29.<br>(1) Lines 21, 22, and 23, plus line 24, less line 26, equals lines 27, 28, and 29.<br>(2) Line 21, plus line 25, less line 26, equals line 27.<br>(3) Lines 27, 28, and 29 equals line 30. |

B.26

QUARTERLY REPORT: CAPITAL OUTLAY FUNDS

COMMUNITY COLLEGE ____________________

| Fund Status Classification | | | Line | Capital Outlay Funds Available by Fund Source | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | | Capital Projects Local | Community Project FS 235.211 | SCOA (CO&DS) | Capital Outlay Bonds (SBE) | Other (Identify) | | |
| | | | | Cash Basis | Cash Basis | Cash Basis | Cash Basis | Cash Basis | Cash Basis | Cash Basis |
| Current Annual Budget | | | 1 | | | | | | | |
| BALANCE FORWARD | 6/30/80 | Total – Capital Outlay Funds | 2 | | | | | | | |
| | | Encumbered | 3 | | | | | | | |
| | | Reserved for Required Expenditure | 4 | | | | | | | |
| | | Unencumbered, Unreserved Balance | 5 | | ▨ | | ▨ | | | |
| FIRST QUARTER | Trans. | Additional Funds Available in Quarter | 6 | | | | | | | |
| | | Encumbered in Quarter *(Estimated)* | 7 | | | | | | | |
| | | Expended in Quarter | 8 | | | | | | | |
| | Balance 9/30/80 | Encumbered | 9 | | | | | | | |
| | | Reserved for Required Expenditure | 10 | | | | | | | |
| | | Unencumbered, Unreserved Balance | 11 | | ▨ | | ▨ | | | |
| SECOND QUARTER | Trans. | Additional Funds Available in Quarter | 12 | | | | | | | |
| | | Encumbered in Quarter *(Estimated)* | 13 | | | | | | | |
| | | Expended in Quarter | 14 | | | | | | | |
| | Balance 12/31/80 | Encumbered | 15 | | | | | | | |
| | | Reserved for Required Expenditure | 16 | | | | | | | |
| | | Unencumbered, Unreserved Balance | 17 | | ▨ | | ▨ | | | |
| THIRD QUARTER | Trans. | Additional Funds Available in Quarter | 18 | | | | | | | |
| | | Encumbered in Quarter *(Estimated)* | 19 | | | | | | | |
| | | Expended in Quarter | 20 | | | | | | | |
| | Balance 3/31/81 | Encumbered | 21 | | | | | | | |
| | | Reserved for Required Expenditure | 22 | | | | | | | |
| | | Unencumbered, Unreserved Balance | 23 | | ▨ | | ▨ | | | |
| FOURTH QUARTER | Trans. | Additional Funds Available in Quarter | 24 | | | | | | | |
| | | Encumbered in Quarter *(Estimated)* | 25 | | | | | | | |
| | | Expended in Quarter | 26 | | | | | | | |
| | Balance 6/30/81 | Encumbered | 27 | | | | | | | |
| | | Reserved for Required Expenditure | 28 | | | | | | | |
| | | Unencumbered, Unreserved Balance | 29 | | ▨ | | ▨ | | | |
| | | Total – Capital Outlay Funds | 30 | | | | | | | |

OEFC 361 (CO 3)
Exp. 7/31/81

## INSTRUCTIONS, PAGE 3

**NOTE:** All funds on this page will be typically accounted for on an ACCRUAL BASIS as defined below in "Additional Funds Available in Quarter".

### DEFINITIONS

| | |
|---|---|
| **Encumbered – (Lines 3, 9, 15, 21, 27):** | Amounts set aside or reserved in accounting records to cover specific purchase orders, or contracts currently in effect and unpaid. |
| **Reserved for Required Expenditure – (Lines 4, 10, 16, 22, 28):** | Funds currently available, but limited by law or SBE rule in their application so that they must be held for a specific project for encumbrance at a later date. For example, capital outlay bond proceeds are limited to specific projects in the bond resolution. Ten percent of PECO entitlement required to be expended on Safety-to-Life projects should be included in this classification. Funds for encumbrance authorizations received but not encumbered would be another example. |
| **Unencumbered, Unreserved Balance – (Lines 5, 11, 17, 23, 29):** | Available funds that are unencumbered, unreserved, or unappropriated and may be applied to any authorized project. |
| **Additional Funds available in Quarter – (Lines 6, 12, 18, 24):** | The receipt of new or additional funds since the prior quarter. Funds on page three will be typically accounted for on an ACCRUAL BASIS, that is when funds or revenues are recorded when the legal or contractual right to receive cash has been established and where expenditures are recorded as expenses as soon as they result in liabilities, even though the revenue or the payment of the expenditure may take place at some future time. |
| **Encumbered in Quarter (Estimated) – (Lines 7, 13, 19, 25):** | Estimated amounts set aside or reserved in accounting records during the quarter in order to cover specific purchase orders, or contracts currently in effect. All funds are considered to be encumbered before expenditure for purposes of this report. |
| **Expended in Quarter – (Lines 8, 14, 20, 26):** | Funds that are spent as reported in your accounting records. |

### COMPUTING INSTRUCTIONS

| | |
|---|---|
| **Current Annual Budget – (Line 1):** | Record the most recent annual budget data available at the time of each report. These data are not used in balancing with data reported on lines 2–30 below. |
| **Total – Capital Outlay Funds – (Lines 2 and 30):** | Lines 3, 4, 5 equal line 2. (For Balance Forward use actual data from Annual Financial Report, if available.)<br>Lines 27, 28, 29 equal line 30. |
| **FIRST QUARTER:** | Transactions for First Quarter listed on lines 6, 7, and 8 update lines 3, 4, and 5 in Balance Forward to yield First Quarter ending balances on lines 9, 10, and 11.<br>(1) Line 2 (or lines 3, 4, and 5), plus line 6, less line 8, equals lines 9, 10, and 11.<br>(2) Line 3, plus line 7, less line 8, equals line 9. |
| **SECOND QUARTER:** | Transactions for Second Quarter listed on lines 12, 13, and 14 update lines 9, 10, and 11, for First Quarter to yield Second Quarter ending balances on lines 15, 16, and 17.<br>(1) Lines 9, 10, and 11, plus line 12, less line 14, equals lines 15, 16, and 17.<br>(2) Line 9, plus line 13, less line 14, equals line 15. |
| **THIRD QUARTER:** | Transactions for Third Quarter listed on lines 18, 19, and 20 update lines 15, 16, and 17 for Second Quarter to yield Third Quarter ending balances on lines 21, 22, and 23.<br>(1) Lines 15, 16, and 17 plus line 18, less line 20, equals lines 21, 22, and 23.<br>(2) Line 15, plus line 19, less line 20, equals line 21. |
| **FOURTH QUARTER:** | Transactions for Fourth Quarter listed on lines 24, 25, and 26 update lines 21, 22, and 23 for Third Quarter to yield Fourth Quarter ending balances on lines 27, 28, and 29<br>(1) Lines 21, 22, and 23, plus line 24, less line 26, equals lines 27, 28, and 29.<br>(2) Line 21, plus line 25, less line 26, equals line 27.<br>(3) Lines 27, 28, and 29 equals line 30. |

B.28

QUARTERLY REPORT: CAPITAL OUTLAY FUNDS

COMMUNITY COLLEGE ______________________

| Fund Status Classification | | | | Capital Outlay Funds Available by Fund Source | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | Public Education Capital Outlay | | | | | | PECO Advance on Bonds | | PECO Loan |
| | | | | 1975-76 | 1976-77 | 1977-78 | 1978-79 | 1979-80 | 1980-81 | 1979-80 | 1980-81 | 1978-79 |
| | | | | Accrual | Accrual | Accrual | Accrual | Accrual | Accrual | Accrual | Accrual | Accrual |
| Current Annual Budget | | | 1 | | | | | | | | | |
| BALANCE FORWARD | 6/30/80 | Total - Capital Outlay Funds | 2 | | | | | | | | | |
| | | Encumbered | 3 | | | | | | | | | |
| | | Reserved for Required Expenditure | 4 | | | | | | | | | |
| | | Unencumbered, Unreserved Balance | 5 | | | | | | | | | |
| FIRST QUARTER | Trans. | Additional Funds Available in Quarter | 6 | | | | | | | | | |
| | | Encumbered in Quarter (Estimated) | 7 | | | | | | | | | |
| | | Expended in Quarter | 8 | | | | | | | | | |
| | Balance 9/30/80 | Encumbered | 9 | | | | | | | | | |
| | | Reserved for Required Expenditure | 10 | | | | | | | | | |
| | | Unencumbered, Unreserved Balance | 11 | | | | | | | | | |
| SECOND QUARTER | Trans. | Additional Funds Available in Quarter | 12 | | | | | | | | | |
| | | Encumbered in Quarter (Estimated) | 13 | | | | | | | | | |
| | | Expended in Quarter | 14 | | | | | | | | | |
| | Balance 12/31/80 | Encumbered | 15 | | | | | | | | | |
| | | Reserved for Required Expenditure | 16 | | | | | | | | | |
| | | Unencumbered, Unreserved Balance | 17 | | | | | | | | | |
| THIRD QUARTER | Trans. | Additional Funds Available in Quarter | 18 | | | | | | | | | |
| | | Encumbered in Quarter (Estimated) | 19 | | | | | | | | | |
| | | Expended in Quarter | 20 | | | | | | | | | |
| | Balance 3/31/81 | Encumbered | 21 | | | | | | | | | |
| | | Reserved for Required Expenditure | 22 | | | | | | | | | |
| | | Unencumbered, Unreserved Balance | 23 | | | | | | | | | |
| FOURTH QUARTER | Trans. | Additional Funds Available in Quarter | 24 | | | | | | | | | |
| | | Encumbered in Quarter (Estimated) | 25 | | | | | | | | | |
| | | Expended in Quarter | 26 | | | | | | | | | |
| | Balance 6/30/81 | Encumbered | 27 | | | | | | | | | |
| | | Reserved for Required Expenditure | 28 | | | | | | | | | |
| | | Unencumbered, Unreserved Balance | 29 | | | | | | | | | |
| | | Total - Capital Outlay Funds | 30 | | | | | | | | | |

OEFC 351 (CO 3)
Exp. 7/31/81

## INSTRUCTIONS, PAGE 4

**NOTE: All funds on this page will be typically accounted for on an ACCRUAL BASIS as defined below in "Additional Funds Available in Quarter".**

### DEFINITIONS

| | |
|---|---|
| Encumbered – (Lines 3, 9, 15, 21, 17): | Amounts set aside or reserved in accounting records to cover specific purchase orders, or contracts currently in effect and unpaid. |
| Reserved for Required Expenditure – (Lines 4, 10, 16, 22, 28): | Funds currently available, but limited by law or SBE rule in their application so that they must be held for a specific project for encumbrance at a later date. For example, capital outlay bond proceeds are limited to specific projects in the bond resolution. Ten percent of PECO. entitlement required to be expended on Safety to-Life projects should be included in this classification Funds for encumbrance authorizations received but not encumbered would be another example. |
| Unencumbered, Unreserved Balance – (Lines 5, 11, 17, 23, 29): | Available funds that are unencumbered, unreserved, or unappropriated and may be applied to any authorized project. Unappropriated funds should be included here where applicable. |
| Additional Funds available in Quarter – (Lines 6, 12, 18, 24): | The receipt of new or additional funds since the prior quarter. Funds on page three will be typically accounted for on an ACCRUAL BASIS, that is when funds or revenues are recorded when the legal or contractual right to receive cash has been established and where expenditures are recorded as expenses as soon as they result in liabilities, even though the revenue or the payment of the expenditure may take place at some future time. |
| Encumbered in Quarter (Estimated) – (Lines 7, 13, 19, 25): | Estimated amounts set aside or reserved in accounting records during the quarter in order to cover specific purchase orders, or contracts currently in effect. All funds are considered to be encumbered before expenditure for purposes of this report. |
| Expended in Quarter – (Lines 8, 14, 20, 26): | Funds that are spent as reported on your accounting records. |

---

### COMPUTING INSTRUCTIONS

| | |
|---|---|
| Current Annual Budget – (Line 1): | Record the most recent annual budget data available at the time of each report. These data are not used in balancing with data reported on lines 2–30 below. |
| Total – Capital Outlay Funds (Lines 2 and 30): | Lines 3, 4, 5 equal line 2. (For Balance Forward use actual data from Annual Financial Report, if available.) Lines 27, 28, 29 equal line 30. |
| FIRST QUARTER: | Transactions for First Quarter listed on lines 6, 7, and 8 update lines 3, 4, and 5 in Balance Forward to yield First Quarter ending balances on lines 9, 10, and 11.<br>(1) Line 2 (or lines 3, 4, and 5), plus line 6, less line 8, equals lines 9, 10, and 11.<br>(2) Line 3, plus line 7, less line 8, equals line 9. |
| SECOND QUARTER: | Transactions for Second Quarter listed on lines 12, 13, and 14 update lines 9, 10, and 11, for First Quarter to yield Second Quarter ending balances on lines 15, 16, and 17.<br>(1) Lines 9, 10, and 11 plus line 12, less line 14, equals lines 15, 16, and 17.<br>(2) Line 9, plus line 13, less line 14, equals line 15. |
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| FOURTH QUARTER: | Transactions for Fourth Quarter liested on lines 24, 25, and 26 update lines 21, 22, and 23 for Third Quarter to yield Fourth Quarter ending balances on lines 27, 28, and 29.<br>(1) Lines 21, 22, and 23, plus line 24, less line 26, equals lines 27, 28, and 29.<br>(2) Lines 21, plus line 25, less line 26, equals line 27.<br>(3) Lines 27, 28, and 29 equals line 30. |

**QUARTERLY REPORT: CAPITAL OUTLAY FUNDS**

**COMMUNITY COLLEGE** ____________________

B.30

| Fund Status Classification | | | | Capital Outlay Funds Available by Fund Source | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | PECO Loan 1979-80 | PECO Loan 1980-81 | Federal (New Const.) | Other (Identify) | | | | CONSOLIDATED TOTAL ALL FUNDS |
| | | | | Accrual | Accrual | Accrual | Accrual | Accrual | Accrual | Accrual | |
| Current Annual Budget | | | 1 | | | | | | | | |
| BALANCE FORWARD | 6/30/80 | Total – Capital Outlay Funds | 2 | | | | | | | | |
| | | Encumbered | 3 | | | | | | | | |
| | | Reserved for Required Expenditure | 4 | | | | | | | | |
| | | Unencumbered, Unreserved Balance | 5 | | | | | | | | |
| FIRST QUARTER | Trans. | Additional Funds Available in Quarter | 6 | | | | | | | | |
| | | Encumbered in Quarter *(Estimated)* | 7 | | | | | | | | |
| | | Expended in Quarter | 8 | | | | | | | | |
| | Balance 9/30/80 | Encumbered | 9 | | | | | | | | |
| | | Reserved for Required Expenditure | 10 | | | | | | | | |
| | | Unencumbered, Unreserved Balance | 11 | | | | | | | | |
| SECOND QUARTER | Trans. | Additional Funds Available in Quarter | 12 | | | | | | | | |
| | | Encumbered in Quarter *(Estimated)* | 13 | | | | | | | | |
| | | Expended in Quarter | 14 | | | | | | | | |
| | Balance 12/31/80 | Encumbered | 15 | | | | | | | | |
| | | Reserved for Required Expenditure | 16 | | | | | | | | |
| | | Unencumbered, Unreserved Balance | 17 | | | | | | | | |
| THIRD QUARTER | Trans. | Additional Funds Available in Quarter | 18 | | | | | | | | |
| | | Encumbered in Quarter *(Estimated)* | 19 | | | | | | | | |
| | | Expended in Quarter | 20 | | | | | | | | |
| | Balance 3/31/81 | Encumbered | 21 | | | | | | | | |
| | | Reserved for Required Expenditure | 22 | | | | | | | | |
| | | Unencumbered, Unreserved Balance | 23 | | | | | | | | |
| FOURTH QUARTER | Trans. | Additional Funds Available in Quarter | 24 | | | | | | | | |
| | | Encumbered in Quarter *(Estimated)* | 25 | | | | | | | | |
| | | Expended in Quarter | 26 | | | | | | | | |
| | Balance 6/30/81 | Encumbered | 27 | | | | | | | | |
| | | Reserved for Required Expenditure | 28 | | | | | | | | |
| | | Unencumbered, Unreserved Balance | 29 | | | | | | | | |
| | | Total – Capital Outlay Funds | 30 | | | | | | | | |

OEFC 351 (CO 3)
Exp. 7/31/81

# REQUEST FOR APPROVAL OF ORDER OF PRIORITIES
# FOR EXPENDITURE OF STATE CAPITAL OUTLAY FUNDS

____________________________
(COMMUNITY/JUNIOR COLLEGE)

State Board of Education
Tallahassee, Florida

____________, 19___

In accordance with the provisions of Article XII Section 9(d), the School Capital Outlay Amendment, and Section 9(a)(2), the Public Education Bond Amendment of the Constitution of Florida, Chapter 235.435, Florida Statutes, and and State Board of Education Administrative Rules based thereon relating to the order of priority of capital outlay projects financed from funds derived under the Amendments, approval of the State Board of Education is hereby requested for the attached list of capital outlay projects.

The Board of Trustees of ____________________ certifies that this list of projects and the order of priority assigned are based on (a) a survey, or surveys, made under rules of the State Board of Education dated: ____________, 19___, as amended, (b) State Law and the State Board of Education Rules relating to priority of projects, and (c) other pertinent information relating to capital outlay needs in this district.

As said funds are made available, the said Board purposes to carry out these projects as nearly as practicable in the order given, subject to changes as provided in State Law and State Board of Education Administrative Rules.

Projects are placed in the proper category according to the following:

I. Completed - when a Certificate of Final Inspection has been issued a project is placed in the completed category. This project will be eligible for the expenditure of State funds during the fiscal year the Certificate is issued and one additional fiscal year thereafter, after which, it will not be listed unless there are outstanding encumbrances. Completed projects are identified only by PPL number and date of Certificate of Final Inspection.

II. Under Construction - when a contract or purchase order is executed for a project, the project is placed in the under construction category and remains there until the Certificate of Final Inspection is issued.

III. Planned - when projects are in the planning stage and State Board of Education approval is being requested so that State Capital Outlay Funds may be expended on the projects, they are placed in the planned category.

Adopted by the Board of Trustees of ________________________________________

____________, 19___.

SIGNED: ________________________________
(Chairman)

ATTEST: ____________________
(President)

OEFC 217 (CO-4)
EXP. 6/30/80

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
An equal opportunity employer

Return five copies to: Office of Educational Facilities Construction
Educational Facilities Surveys

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
Affirmative action/equal
opportunity employer

FLORIDA DEPARTMENT OF EDUCATION
OFFICE OF EDUCATIONAL FACILITIES CONSTRUCTION

# PROJECT PRIORITY LIST

Page ______ of ______

______________________________ College

______________________________ , 19 ____

**SEE INSTRUCTIONS ON BACK** Submit five copies (use additional sheets as necessary).

| (1) PROJECT PRIORITY LIST NO. | (2) PRIORITY RATING LETTER | (3) DESCRIPTION OF PROJECT | (4) ESTIMATED COST |
|---|---|---|---|
| | | | |

## INSTRUCTIONS

A. Projects recommended in an educational facilities survey are eligible to be placed on this PPL in order of priority as established by Florida State Board of Education Administrative Rule 6A-2 and Chapter 235.435 as they meet the following:

1. "A" priority projects are eligible to be placed on the PPL immediately.
2. "B" priority projects are eligible to be placed on the PPL only after all "A" priority projects and "B" priority projects that are identified as being funded as provided in 6A-2.206(2) or 6A-2.206(3) have been listed.
3. "C" priority projects are eligible to be placed on the PPL only after all "A" and "B" priority projects have been listed.

B. Safety-to-life and health and sanitation projects as identified in 6A-2, Part III, Section B and in the annual Comprehensive Safety Inspection are to be aggregated as one project on the PPL, or at least one project annually.

C. Projects for necessary modifications for the physically disabled in existing buildings recommended for continued use in a survey report as provided in Chapter 255.21 Florida Statutes are to be aggregated as one project on the PPL, or at least one project annually.

D. Projects for additional or replacement equipment for existing buildings that are identified as being funded as provided in 6A-2.206(3) are to be aggregated as one project on the PPL, or at least one project annually.

E. Projects for replacement of roofs of existing buildings as provided in 6A-2.205(8) are to be aggregated as one project on the PPL with the buildings identified.

F. Categories of projects are to be listed in order of (1) completed, (2) under construction and (3) planned.

G. Columnar information:
*Column 1: Project Priority List number as specified by college
Column 2: Priority rating letter as identified in 6A-2.206
Column 3: Description of project as given in educational facilities survey report
Column 4: Estimated cost as calculated by college

* DO NOT REUSE A PROJECT PRIORITY LIST NUMBER WITHIN A FIVE YEAR PERIOD.

Submit five copies to:

Office of Educational Facilities Construction
Educational Facilities Surveys
Knott Building
Tallahassee, Florida 32301

MEMORANDUM RE : Site Inspections

FROM : Board of Trustees, ________________ Junior/Community College, ________________, Florida

TO : Educational Facilities Survey Section, Office of Educational Facilities Construction, Department of Education

A. In accordance with Section 235.19, Florida Statutes and State Board of Education Rules, a proposed site has been selected and is further described as follows:

1. This proposed site is to be used for ________________ (identification) as referred to in Educational Facilities Survey Report, dated ________________, page ______, Supplement dated __________. 19______; OR

2. This site is not recommended in the current survey, but according to our long-range plans, we would like to use it for ________________ (proposed use of site).

3. This site coordinated with ________________ (planning agency) in ________________ (month and year)

4. Agreement reached with ________________ (agency) in ________________ (month and year) to provide necessary traffic control and safety devices required by law.

5. Agreement reached with ________________ (agency) in ________________ (month and year) to provide fire and police protection.

6. Agreement reached with ________________ (agency) in ________________ (day and month) for primary and secondary access roads to site.

7. Agreement reached with (a) ________________ in ________________
(b) ________________ in ________________
(c) ________________ in ________________
(agency or on-site) (day and month)
for the provision of (a) electricity, (b) water and (c) sewage disposal.

8. Agreement reached with ________________ (agency) in ________________ (day and month) to provide adequate drainage.

9. (a) Estimated Cost (above purchase price) to make site usable (grading, piling, on-site water/sewerage, etc.) ________________.
(b) Soil test (borings) indicate suitability for building: Yes ______ No ________.

10. Site free of right-of-way easements: Yes ____ No ____ If no explain ________________.

11. Number of acres on site ____; Ultimate student capacity ______. If site is under minimum requirements of SBE Admin. Rule 6A2.39, attach waiver request, as provided in SBE Reg. 6A2.39 (1)(b).

12. Name of city, community, or subdivision ________________.

13. Property locally known as ________________.

B. Description and location with respect to nearest streets or roads, shown on attached sketch: (include dimensions, nearest major street or road, distances from roads and streets shown.)

C. It is requested that this site be inspected by a staff member of the Department of Education in order to establish eligibility for expenditure of State Capital Outlay Funds at this site.

Date ________________ 19 ____ ________________
President

Request initiated by the President who should complete Sections A, and B and C, and send three copies to the Educational Facilities Survey Section, Office of Educational Facilities Construction, Department of Education.

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OEFC 218 (CO-5)
EXP: 6/30/80

(This page to be completed by Department of Education Personnel)

D. Report of site inspection by staff member(s):*

14. The following additional comments are made with respect to the information given in Section A:________________

______________________________________________

______________________________________________

15. A. Location features (yes, no or type)

Adjoins right of way of railroad________________
Adjoins right of way through highway______________
Under flight pattern__________________________
Adjacent to factory___________________________
Adjacent to property with interference
to the school program by noise________odor________
Could be expanded____________________________
Utilities available: Water______________________
Sewage___________Electricty___________Gas______

B. Physical features (yes or no)

Well drained__________________________________
Reasonably free of mud__________________________
Soil adapted to landscaping______________________
Soil adapted to physical education purpose________
Shape of site adapted to school purposes_________
Adequate street access for bus traffic___________
Adequate street access for auto traffic__________

16. Right-of-way restrictions:__________________________

______________________________________________

17. Date of inspection______________________________
Inspected by____________________________________

E. Action by Office of Educational Facilities Construction **

Based on information furnished hereon and other survey records this site (is) (is not) approved as a suitable location for:

____________________________________________________
(proposed use of site)
and is approved for expenditure of State Capital Outlay Funds.

Stipulations:________________________________________

____________________________________________________

____________________________________________________

Ralph D. Turlington By________________________
Commissioner of Education Date_______________________

---

*The Educational Facilities Survey Section will arrange with a staff member for making the inspection and will furnish him with one copy of the inspection request. Section D is to be completed by the inspector and the copy returned to the Educational Facilities Survey Section.

**The Educational Facilities Survey Section will complete the report and distribute: One copy to the requesting board, one copy to the Survey Section file, and one copy to the Architectural Facilities Planning Section.

OEFC 218 (CO-5)
EXP: 6/30/80

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
An Equal Opportunity Employer

# RESOLUTION
## THE BOARD OF TRUSTEES OF ____________ JUNIOR/COMMUNITY COLLEGE
## REQUESTING AN EDUCATIONAL PLANT SURVEY

BE IT RESOLVED, THAT:

1. The State Department of Education is requested to arrange for a survey to determine the educational plant status and needs of this Junior/Community College at an early date.

2. The Board and President of the College agree to:
   - (a) Take every step practicable to assure full cooperation of faculty, staff, and patrons in carrying on the survey
   - (b) 1. Pay the travel expenses of members of the survey staff from their respective places of employment to the college, necessary vicinity and return; such travel to be paid on the basis of standard state mileage rates plus necessary toll charges, if any, or actual cost of commercial carrier
     - 2. Pay living expenses of the survey staff memebers from the time of their departure to the time of their return on the basis of standard state per diem rates. In exceptional circumstances it may be necessary, by prior arrangement, for the college to pay actual living expenses of the survey staff in those instances where seasonal costs are so high that standard per diem rates are not adequate to reimburse actual living expenses
   - (c) Provide transportation for members of the survey staff for visiting sites, campuses, and carrying on the necessary field work
   - (d) Provide accurate and complete demographic information data on students, information on present buildings and sites, and other information needed by the survey staff
   - (e) Provide necessary clerical assistance for the survey staff
   - (f) Pay the travel and per diem expenses for non-DOE personnel involved in subsequent supplementary surveys.

3. This request is made by this Board with the understanding that the State Department of Education will:
   - (a) In agreement with the President of the College, set a date for the field work of the survey as soon as practicable
   - (b) Arrange for a well-qualified survey staff to study the educational plant problems and needs of the college in cooperation with the college officials and interested patrons of the college
   - (c) See that there is prepared and presented to the Board a written report of the findings and the recommendations of the survey staff
   - (d) Cooperate with the Board and the President of the College in explaining, interpreting, and implementing the survey report
   - (e) Pay the travel and per diem expenses for DOE personel involved in subsequent supplementary surveys.

Adopted this _____ day of ______________, 19______ by the Board of Trustees

____________________________________ Junior/Community College.

ATTEST: Signed:______________________________
(Chairman of the Board)

______________________________________________
(President of the College and Secretary of the Board)

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
An equal opportunity employer

OEFC 093 (CO-6)
EXP. 10/1/80

APPLICATION AND CERTIFICATION FOR ADVANCE FUNDING
FOR SPECIFIED PROJECTS FROM THE PUBLIC EDUCATION
CAPITAL OUTLAY AND DEBT SERVICE TRUST FUND BY THE

______________________________________

The secretary of the board, acting on behalf of ____________________ ____________________________, hereby requests advance funding from the Public Education Capital Outlay and Debt Service Trust Fund as authorized by Section 235.221, Florida Statutes and Chapter 6A-2.44, State Board of Education Rules, and the attached resolution approved by the board of ____________________. This action requests an Advance Funding Encumbrance Authorization from the trust fund, to be effective on ____________________________, or as soon as possible thereafter, in the total amount of ______________________, to fund projects identified as follows:

| PPL or Project Identification Number | Project Name | Amount of Advance Funds Requested by Project |
|---|---|---|
| | | |
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The evidence and certifications required with the application by Section 235.221, Florida Statutes and Chapter 6A-2.44, State Board of Education Rules, are listed below, and have been completed as a part of this application together with the resolution of this board authorizing this request.

1. Evidence that the educational plant or fixed capital outlay need has been authorized by law.

2. Evidence that existing cash will not provide the resources necessary to finance the construction of the educational plant or the fixed capital outlay need.

3. Evidence that the requested advance does not exceed seven (7) times the current allocation as provided in Section 235.435, Florida Statutes.

4. Evidence that the requested advance when added to the district's current fixed capital outlay funds available will provide sufficient funds with which to fund the above needs.

5. Evidence that Phase III plans and specifications have been submitted to the Office of Educational Facilities Construction.

Attached is a schedule of the estimated encumbrance dates and amounts for each phase of each project listed above, and a schedule of the estimated cash disbursements.

Date: __________________________ District: ____________________

By: __________________________

OEFC 092 (CO-7)
Expires 10/1/79

## PROJECT EVIDENCE TO SUPPORT ADVANCE FUNDING - (Attachment 1)

District ____________

This form is furnished to supply evidence for projects for which advance funding is requested under provisions of Section 235.221, Florida Statutes and Chapter 6A-2.44, State Board of Education Rules.

| Project Identification | | Amount Budgeted (By Fund Source) | | | | | | Estimated Total Cost of Project |
|---|---|---|---|---|---|---|---|---|
| PPL or Project I.D. Number | Description on PPL or Project I.D. List | | | | | | | |
| 1(A) | | | | | | | | $ |
| 1(B) | | | | | | | | $ |
| 1(C) | | | | | | | | $ |
| 1(D) | | | | | | | | $ |

Estimated Total Cost of Projects $____________

B.38

OEFC 092 (CO-7)
Expires 10/1/79

PROJECT EVIDENCE TO SUPPORT ADVANCE FUNDING - (Attachment II) District ____________

This form is furnished to supply evidence for projects for which advance funding is requested under provisions of Section 235.221, Florida Statutes and Chapter 6A-2.41, State Board of Education Rules, listed as items 1 and 5 of the attached Application and Certification.

| | Project Identification | | | | | | |
|---|---|---|---|---|---|---|---|
| | PPL or Project I. D. Number | Description on PPL or Project I.D.List | Date of Survey Recommendation | Date of PPL Approval by SBE | Date Phase III Plans Submitted to OEFC | Estimated Amount of Advance Funding Needed | Estimated Total Cost of Project |
| 2(A) | | | | | | $ | $ |
| 2(B) | | | | | | $ | $ |
| 2(C) | | | | | | $ | $ |
| 2(D) | | | | | | $ | $ |

2(E) Total Amount Requested $________

Estimated Total Cost of Projects $________

B.39

## FINANCIAL EVIDENCE TO SUPPORT ADVANCE FUNDING- (Attachment III)

District____________

This form is submitted for the total amount of Advance Funding requested under provisions of Section 235.221, Florida Statutes and Chapter 6A-2,44, State Board of Education Rules, in response to item 2 on the attached Application and Certification.

|  | Fund Source(Identify) |  |  |  |  |  | Total all Capital Outlay Funds |
|---|---|---|---|---|---|---|---|
|  |  |  |  |  |  |  |  |
| 3(A) Available for Capital Outlay Encumbrance end of preceding quarter (form OEFC 351 or form CO-3) |  |  |  |  |  |  |  |
| 3(B) Additional Capital Outlay Funds authorized or received to date in this quarter |  |  |  |  |  |  |  |
| 3(C) Capital Outlay Funds encumbered to date in this quarter (identify by project)<br>____________<br>____________<br>____________ |  |  |  |  |  |  |  |
| 3(D) Net Capital Outlay available for encumbrance this date |  |  |  |  |  |  |  |
| 3(E) Additional Capital Outlay anticipated this Fiscal Year |  |  |  |  |  |  |  |
| 3(F) Amount reserved for other projects (identify)<br>____________<br>____________<br>____________ |  |  |  |  |  |  |  |
| 3(G) Net Amount available for projects of this Advance Funding |  |  |  |  |  |  |  |

8.40

OEFC 092 (CO-7)
Expires 10/1/79

District ____________________

## FINANCIAL EVIDENCE TO SUPPORT ADVANCE FUNDING-(Attachment IV)

This form is submitted for the total amount of Advance Funding Requested under provisions of Section 235.221, Florida Statutes and Chapter 6A-2.44, State Board of Education Rules, in response to items 3 and 4 on the attached Application and Certification.

3. (A) Amount of request for Advance Funding (equals attachment II, line 2(E) ) $____________________

(B) Amount of Current year allocation from Public Education Bond Amendment (does not include special appropriations) $____________________ x seven (7) $____________________

NOTE: Item (A) must not exceed item (B)

4. (A) Amount requested for Advance Funding attachment II, line 2(E) $____________________

(B) Net amount available for projects of this Advance Funding (attachment III, line 3(G) ) $____________________

(C) Total available for projects of this Advance Funding (line 4(A) plus line 4(B) above) $____________________

(D) Estimated total cost of projects of this Advance Funding (attachment II, line 2(F) ) must equal line 4(C) above) $____________________

RESOLUTION OF THE ____________________

________________________________________

WHEREAS, Section 233.42, Florida Statutes, authorizes and establishes a trust fund known as the "Public Education Capital Outlay and Debt Service Trust Fund,"

WHEREAS, Section 233.221, Florida Statutes and Chapter 6A-244, State Board of Education Rules, authorizes the making of monetary advances to boards, including the Board of Regents, for financing authorized capital outlay projects from the trust fund and,

WHEREAS, this board has determined that there is a need for the capital outlay projects identified as:

| PPL or Project Identification Number | Project Name | Total Cost |
|---|---|---|
| | | |
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| | | |

and,

WHEREAS, at the present time this board does not have sufficient monies to finance the cost of the educational facility or facilities described above;

NOW, THEREFORE, be it resolved that the board hereby makes application to the State Board of Education through the Department of Education for an advance as provided in Section 235.221, Florida Statutes and Chapter 6A-2.44, State Board of Education Rules, and that said application shall contain all of the requirements as specified by rule and law. A copy of said application with the required evidence, certifications and listings are attached hereto and made a part of this Resolution as if fully recited herein.

Be it further resolved that monies received from the advancement will be expended only on the project(s) for which advance funds have been approved. Monies from the advancement will not be requested to cover monthly capital outlay disbursements until all current funds available which have been pledged to the projects(s) have been expended. Any funds found unneeded will not be used and it is agreed that the State Board of Education will reduce the amount previously approved for encumbrance.

Be it further resolved that this board shall repay the amount of said advance plus accrued interest, if any, to the trust fund from capital outlay funds that are allocated to the agency from the trust fund, and the Department of Education is authorized to make said deductions for the purpose of collecting said advances. This board hereby waives eighty percent (80%) of future annual allocations until the total amount of the advancement is repaid.

IN WITNESS WHEREOF, the parties hereto, by the undersigned, authorized to bind said parties, set their hands on this _____ day of __________, 19___.

WITNESSES

____________________________ By: ____________________________

____________________________ Title: ____________________________

SHEET ____ of ____

____
INSPECTION DATE

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
An equal opportunity employer

# COMPREHENSIVE SAFETY INSPECTION
# STATE BOARD OF EDUCATION
# ADMINISTRATIVE RULE 6A-2 PART III SECTION B

FISCAL YEAR

1979/1980

____
SCHOOL DISTRICT/COMMUNITY COLLEGE

____
SCHOOL/FACILITY/CAMPUS

____
F.I.S.H./F.I.C.E. NUMBER

____
INSPECTOR

PLEASE PRINT LEGIBLY OR USE TYPEWRITER

____
ADDRESS

B.43

| Rule 6A-2 | | TYPE | LOCATION | | ESTIMATED COST | DEFICIENCY DESCRIPTION | |
|---|---|---|---|---|---|---|---|
| NO. | SUB. PAR. | | BLDG. NO | ROOM NO. | TYPE C ONLY | | |
| | | | | | | | 1 |
| | | | | | | | 2 |
| | | | | | | | 3 |
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OEFC 207 Exp.6-30-80 CC CO 9 Exp. 6-30-80

# INSTRUCTIONS FOR THE COMPLETION OF THE COMPREHENSIVE SAFETY INSPECTION REPORT

INSPECTION DATE - The month, day, and year the inspection was completed.

INSPECTOR - The name of the certified inspector making the inspection.

FISCAL YEAR - The fiscal year in which the inspection is made.

SCHOOL DISTRICT/COMM.COL. - The name of the local school district or community college.

SCHOOL/FACILITY/CAMPUS - The name and address of the individual school, facility, or campus being inspected.

F.I.S.H./F.I.C.E.NUMBERS - School Districts use their F.I.S.H. number. Community Colleges use 990, plus their F.I.C.E. number.

ADDRESS - School, facility, or campus address.

6A-2 RULE NUMBER - Enter the rule number of Chapter 6A-2. Example - Rule 6A-2.77 Electrical - put only 77 in this column, as 6A-2. is always the same regardless of the specific rule referred to.

6A-2 RULE SUB. PAR. - Enter the subparagraph of the specific rule referred to. Example - Rule 6A-2.78 sub. par. 1a - put only 1a in this column. (If no subparagraph number is required to describe the deficiency, leave space blank.)

TYPE - Enter the appropriate type of deficiency - M, O, C. as defined below:

M - Maintenance of Plant. Consists of those activities that are concerned with keeping the grounds, buildings, and equipment at their original condition of completeness or efficiency through repairs.

O - Operation of Plant. Consists of the housekeeping activities concerned with keeping the physical plant open and ready for use. It includes cleaning, disinfecting, heating, lighting, communications, power, moving furniture, handling stores, caring for grounds, and other such housekeeping activities as are repeated somewhat regularly on a daily, weekly, monthly, or seasonal basis. Operation of plant does not encompass the repairs and replacements of facilities and equipment.

C - Capital Outlay. Expenditures for the acquisition of fixed assets or additions to fixed assets. They are expenditures for land or existing buildings; improvements of grounds; construction of buildings; additions to buildings; initial equipment: and additional equipment.

LOCATION BLDG. NO. - Enter the building number in which the deficiency is found.
*See notes 1, 2, 3, and 4.

LOCATION ROOM NO. - Enter the room number in which the deficiency is found.
*See notes 1, 2, 3, and 4.

ESTIMATED COST (TYPE C ONLY) - Enter the estimated cost to the nearest dollar of removing the deficiency of a capitol outlay nature only (Type C). Do not enter cost estimates on Maintenance and Operations items.

DEFICIENCY DESCRIPTION - Use this column for information required that will describe the deficiency.

*NOTE 1 When the same deficiency is found in several locations throughout a building, put in the building number and 0000 in the room number column. This will indicate that the same deficiency was found throughout the building.

*NOTE 2 When the same deficiency is found in several buildings throughout the school, facility, or campus, put 00 in the building number column and 0000 in the room number column. This will indicate the deficiency is found in numerous buildings.

*NOTE 3 When a deficiency is found on the site, put 00 in the building number column and put the applicable code listed below in the Room Number column.
Playground or Athletic Field - 9699
Driveway or Parking Area - 9698
Landscaped Area or sidewalk - 9599

*Note 4 When a deficiency is found on the outside of the building code in the building number and put the applicable code listed below in the Room Number column.
Roof - 8089
Walk - 8088
Covered Walkway - 8087

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
An equal opportunity employer

# FLORIDA DEPARTMENT OF EDUCATION
## OFFICE OF THE COMPTROLLER
## EXPENDITURES OF STATE & LOCAL FUNDS FOR VOCATIONAL EDUCATION
Fiscal Year Ending June 30, 1979

Agency Number ________ ________ ________

Agency Name: ________________

Date Report Filed ________________

Return to the Office of the Comptroller, Room 124 Knott Building, Tallahassee, Florida 32301 not later than August 31, 19__.

| Programs/Functions/Activities | HANDICAPPED | DISADVANTAGED | LIMITED ENGLISH SPEAKING ABILITY | POST SECONDARY AND ADULT | REGULAR SECONDARY | TOTAL |
|---|---|---|---|---|---|---|
| SECTION 120 - TOTAL | | | | | | |
| 1 - Vocational Ed. Programs | | | | | | |
| 2 - Work Study | | | | | | |
| 3 - Cooperative | | | | | | |
| 4 - Energy | | | | | | |
| 5 - Construction | | | | | | |
| 6 - Placement Services | | | | | | |
| 7 - Industrial Arts | | | | | | |
| 8 - Support Serv. for Women | | | | | | |
| 9 - Day Care Services | | | | | | |
| 10 - Displaced Homemakers | | | | | | |
| 11 - Contracted Instruction | | | | | | |
| 12 - Administration | | | | | | |
| SECTION 130 - TOTAL | | | | | | |
| 1 - Research | | | | | | |
| 2 - Exemplary | | | | | | |
| 3 - Curriculum Development | | | | | | |
| 4 - Guidance & Counseling | | | | | | |
| 5 - Preservice & Inservice | | | | | | |
| 6 - Sex Bias | | | | | | |
| 7 - Administrative | | | | | | |
| SECTION 140 - TOTAL | | | | | | |
| SECTION 150 - TOTAL | | | | | | |
| 1 - Instruction | | | | | | |
| 2 - Ancillary | | | | | | |
| GRAND TOTAL | | | | | | |

**CERTIFICATION:**

I hereby certify that this report accurately reflects all expenditures of state and local funds for Vocational Education during FY 19__-__.

________________ Fiscal Officer

________________ District Superintendent/President/Agency Head

________________ Vocational Director/Dean

FA 397

(Instructions on Reverse Side)

# 1979 ANNUAL VOCATIONAL EDUCATION FINANCIAL STATUS REPORT

The purpose of this form is to collect data on state and local funds expended for vocational education by each local educational agency.

The information reported herein will fulfill the requirements of Section 161(a) and Section 108 of the P.L. 94-482; as well as Section 437 of GEPA in P.L. 93-380.

## Section 120

Line 1 - Enter total instructional expenditures of state and local funds for all coded programs of vocational education as identified in Florida Vocational Education Information System Instructional Manual, pages 14-35.

Line 2 - Enter total expenditures of state and local funds for vocational work study programs. Amount must not be less than average annual expenditure for work study programs of a similar character during the three preceding fiscal years. See P.L. 94-482; Section 121; Paragraph (a)(5).

Line 3 - Enter total expenditures of state and local funds for cooperative vocational education programs - P.L. 94-482, Section 122. Include ancillary services as defined in Section 122, Paragraph D.

Line 4 - Enter total expenditures of state and local funds for energy education.

Line 5 - Enter total expenditures of state and local funds for construction for vocational education school facilities.

Line 6 - Enter total expenditures of state and local funds for placement services for students who have successfully completed vocational education programs.

Line 7 - Enter total expenditures of state and local funds for industrial arts programs that assist in meeting the purposes of P.L. 94-482.

Line 8 - Enter total expenditures of state and local funds for support services for women who enter programs designed to prepare individuals for employment in jobs which have been traditionally limited to men, including counseling, as to the nature of such programs and the difficulties which may be encountered by women in such programs, and job development and job follow-up services.

Line 9 - Enter total expenditures of state and local funds for day care services for children of students in secondary and post-secondary vocational education programs.

Line 10 - Enter total expenditures of state and local funds in vocational education for:
- (a) persons who had been homemakers but who must seek employment because of dissolution of marriage
- (b) persons who are single heads of households and who lack adequate job skills
- (c) persons who are currently homemakers and part-time workers but who wish to secure a full-time job
- (d) women who are now in jobs which have not been traditionally considered job areas for females, and men who are now in jobs for males who wish to seek employment in job areas which have not been traditionally considered job areas for males.

Line 11 - Enter total expenditures of state and local funds for instructional services provided under contract with private vocational training institutions.

Line 12 - Enter total expenditures of state and local funds for salaries, travel, equipment, supplies, communications, utilities, and other related expenditures for administration, supervision, and evaluation attributable to vocational education under subpart 2 of P.L. 94-482.

## Section 130

Line 1 - Enter total expenditures of state and local funds for research programs as described in Section 131 of P.L. 94-482.

Line 2 - Enter total expenditures of state and local funds for exemplary and innovative programs as described in Section 132 of P.L. 94-482.

Line 3 - Enter total expenditures of state and local funds for curriculum development programs as described in Section 133 of P.L. 94-482.

Line 4 - Enter total expenditures of state and local funds for guidance and counseling services, programs, and activities as described in Section 134 of P.L. 94-482.

Line 5 - Enter total expenditures of state and local funds for preservice and inservice training as described in Section 135 of P.L. 94-482.

Line 6 - Enter total expenditures of state and local funds for overcoming sex stereotyping and bias in vocational education.

Line 7 - Enter total expenditures of state and local funds for salaries, travel, equipment, supplies, communications, utilities, and other related expenditures for administration, supervision, and evaluation attributable to vocational education under subpart 3 of P.L. 94-482.

## Section 140

Enter total expenditures of state and local expenditures for special programs for the disadvantaged as described in this section of P.L. 94-482.

## Section 150

Line 1 - Enter total expenditures of state and local expenditures for instruction in consumer and homemaking education as described in subpart 5 of P.L. 94-482.

Line 2 - Enter total expenditures of state and local expenditures for ancillary services, activities, and other means of assuring quality in all homemaking education programs such as teacher training and supervision, curriculum development, research, program evaluation, special demonstration and experimental programs, development of instructional materials, exemplary projects, provision of equipment and administration and leadership.

Form FA-13
DOE Comptroller
Revised 2/77

Original Forecast ____
Amended Forecast ____

# FEDERAL CASH ADVANCE FORECAST

AGENCY NAME ______________________________

AGENCY CODE ______________________________

FOR THE QUARTER BEGINNING ______________________________

| | | | |
|---|---|---|---|
| 1. | Outstanding Federal Project Allocation Balances as of Beginning of Quarter | | $______ |
| 2. | Estimated Cash Needs for Quarter | $______ | |
| 3. | Less: Estimated Cash Balance at Beginning of this Quarter | $______ | |
| 4. | Additional Cash Needed for Quarter | | $______ |
| 5. | Amount Needed for: 1st Month* | $______ | |
| | 2nd Month* | $______ | |
| | 3rd Month* | $______ | |
| | TOTAL NEEDED THIS QUARTER - | | $______ |

*If your cash needs for any month should vary from the amount you estimated above, submit an amended FA-13 to cover the revised need no later than the 15th of the month for which you want the amendment to be effective. Any amendment received after the 15th of the month will result in the requested amendment being reflected in the next month's cash advance draw.

______________________________
Finance Officer

______________________________
Date

DUE DATE: This form is due on or before the 15th of the month preceding the quarter that this forecast covers. Any forecast received after the 15th will result in a delay in drawing your warrant for the first month of the applicable quarter.

SUBMIT TO: Mr. Ted J. Meredith
Comptroller
Department of Education
Knott Building
Tallahassee, FL 32304

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
An equal opportunity employer

FA 396

## INSTRUCTIONS FOR COMPLETING FA-13

1. Outstanding Federal Project Allocation Balances (Accounts Receivable From DOE) as of Beginning of Quarter.

   Enter the total of all Federal Project Allocation Balances as of the latest date available.

2. Estimated Cash Needs for Quarter.

   Enter your estimated cash needs for the next three months.

3. Estimated Cash Balance as of the Beginning of this Quarter.

   Compute as Follows:

   Cash Advance Balance as of the 15th of the month preceding the start of the new quarter $__________

   LESS:

   Cash Due to Other Funds $__________

   Invoices to be Paid within 15 days $__________

   Payrolls to be Paid within 15 days $__________

   ADJUSTED CASH ADVANCE BALANCE (Enter This Amount as Item 3) $__________

4. Additional Cash Needed for Quarter (Item 2 less Item 3)

5. Indicate how you need to receive the amount arrived at in Item 4 above. The three monthly disbursements must total to the amount shown in Item 4.

NOTE: Timely FA-1 reports will eliminate delays in your receiving these amounts on or before the 10th of each month. Reasonableness of amounts in relation to project allocation balances will avoid questions that might cause delays.

*If revised cash need is because of new projects, include these projects as a part of the total in Item 1 on an amended forecast.

District/Agency Name ____________________
Program Name ____________________
Effective Approval Date ____________________
Termination Date ____________________

FLORIDA DEPARTMENT OF EDUCATION
SPECIAL PROGRAM FUNDS

BUDGET RECAPITULATION AND/OR PROJECT
EXPENDITURE REPORT — FA-1

*(Instructions on reverse)*

____________________ District/Agency Number
____________________ Program Number
____________________ Project Number
____________________ Total Project Dollars

B.50

| (1) Account or Func. No. | (2) Account or Object No. | (3) Name of Account | (4) Budget Amount | (5) Total Expended to Date As of ___/___/___ | (6) Unexpended Balance | (7) Current Expenditure Reported |
|---|---|---|---|---|---|---|
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| | | (8) Column TOTALS *(Complete on last page only)* | | | | |
| | | (9) REIMBURSEMENT PERCENT | % | % | % | % |
| | | (10) TOTAL FEDERAL FUNDS | | | | |

(11) CERTIFICATION: *(Complete on last page only)*
I hereby certify that I have reviewed this report and that the items shown herein are properly classified according to this District's/Agency's current chart of accounts; that all the expenditures included in this report were obligated for subsequent to project approval date and prior to the termination date; that all expenditures have been made in accordance with applicable laws and regulations and were included on the approval indicated above; that no prior report has been made for any item reported as current expenditures and that all inventory items included herein have been properly entered on the inventory records as required by the Florida Statutes. I further certify that none of the expenditures reported herein will be used for matching funds on this or any other special project, and that all records necessary to substantiate this report are on file and available for review as necessary by State and Federal Monitoring Staff.

FA 399

Report Number ____________
Page ________ of ____________

Certified Correct ______________________________ Date ___/___/___
Finance Officer or Authorized Representative

DOE USE
Audited by: ____________
Date: ___/___/___

## INSTRUCTIONS FOR COMPLETING FORM

| | | |
|---|---|---|
| A. | General Information. Complete as indicated. | |
| B. | Columns (1) - (4) | Use latest approved copy of Project Budget as amended to complete. |
| | Column (5) | Complete by using total project expenditures as of the date reported above. |
| | Column (6) | Complete by subtracting column (5) from column (4). |
| | Column (7) | Complete by reporting all current expenditures. Enter the difference between the amount shown in column (5) on previous report and column (5) of this report. |
| | Items (8) - (10) | Complete on last page only as indicated. The Totals column must represent the complete status of the project. |
| | Item (4) | Have Certification signed by finance officer or authorized representative on last page only. |

Submit two (2) copies by the 20th of each month following the month of disbursement to: Comptroller's Office, Florida Department of Education, Knott Building, Tallahassee, Florida 32301.

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
An equal opportunity employer

FA-400

# FLORIDA DEPARTMENT OF EDUCATION

## Monthly Report of Financial Transactions
## CETA Funds

I.

| | | | |
|---|---|---|---|
| Total Approved Projects | | | Date of Report Preparation |
| 1. Project Number | | 2. District/Agency | |
| 3. Agency Address | | 4. City or Town | 5. County |
| 6. Agency Number | 7. State | 8. Zip Code | 9. Telephone No. |
| 10. Project Approval Date | | 11. Reporting Period | 12. Termination Date of Project |

II. SUMMARY OF FINANCIAL ACTIVITIES

| Contract Cost Category | (A) Budget | (B) Total Expenditure To Date | (C) Expenditure This Report | (D) Current Obligation | (E) Budget Balance |
|---|---|---|---|---|---|
| 1. Administrative Cost | | | | | |
| 2. Training Cost | | | | | |
| 3. Services to Clients | | | | | |
| 4. TOTAL COSTS | | | | | |

CERTIFICATION STATEMENT

I hereby certify that I have reviewed the financial data above and that the items shown therein are properly classified according to this District's/Agency's current program budget.

Certified Correct ______________________ Date __________

Name Typed ______________________

Title ______________________

INSTRUCTIONS

III. Summary of Financial Activities:

A. Budget Column:
This column must agree with your DVE 429, which is your budget. At no time can you adjust between the cost catagories without prior approval from the Vocational Division, State Department of Education.

B. Total Expenditures to Date Column:
Add totals from this column in prior report and column (C), "Expenditures this Report" column of this report.

C. Expenditures this Report Column:
Enter actual cash disbursements for each cost catagory for the current reporting period.

D. Current Obligation Column:
Enter total of encumbered obligations at the end of reporting month.
Do not include salaries or fringe benefits.

E. Budget Balance Column:
Subtract column (B), "Total Expenditures to Date" and column (D) "Current Obligations", from column (A) "Budget".

THIS REPORT IS DUE EACH MONTH AND NOT LATER THAN THE FIFTEENTH (15th) OF THE MONTH FOLLOWING THE MONTH BEING REPORTED.

Submit all completed FA-400 Forms in Duplicate to: Department of Education
Comptroller
Tallahassee, Florida 32301

State of Florida
Department of Education
Tallahassee, Florida
Ralph D. Turlington, Commissioner
Affirmative action/equal opportunity employer

FA-400

# FLORIDA DEPARTMENT OF EDUCATION
## Adult and Community Education Section

## ADULT EDUCATION ANNUAL REPORT

## INTRODUCTION

The principal purpose of this report is to allow the State of Florida to use the information found in the enclosed tables for planning purposes. The report serves as a standardized data collection format for use by all district school boards, and as a feeder for the Adult Education Annual Performance Report to the U.S. Office of Education. The collected information is used to publish reports and to respond to inquiries, and is used as a program tool by the Department of Education to assess adult education programs in Florida. Such information provides a basis for changes in State policies, redirection of resources, and provision of various forms of assistance to district school boards.

Table 1 is concerned with the age, sex, and ethnic characteristics of the population served by adult education programs in Florida.

Table 2 deals with instructional levels, program completions, the number of participants who separated from the programs, and their reasons for separating.

Table 3 pertains to the number of participants by location of classes, and with the number of day and evening classes in the program.

Table 4 requests information on the impact of the adult education program on program participants.

Table 5 is related to staffing patterns of paid local personnel and the number of personnel in the adult education program staff who are participating in inservice programs.

Table 6 pertains to the distribution of grant expenditures to supplement basic and secondary programs for institutionalized and noninstitutionalized adult students.

The alignment of data in the tables permits the State Administrator to look at the overall performance of individual programs in comparison to the State program. For this report to be of maximum value, it is essential that the information provided be accurate.

This report is due to the Administrator, Adult and Community Education Section, Department of Education, Tallahassee, Florida 32301, not later than August 15, 19 . One signed original and two copies are required. Further payments or other benefits under the Adult Education Act may be withheld unless this report is completed and filed in a timely manner. Assistance in preparing this report is available from the Adult and Community Education Section.

ESE 333

## GENERAL

At the top of page 3, enter the name of the reporting agency, the reporting date, the signature of the adult education director, and the director's specific title.

## PART I — STATISTICAL

### Table 1 Instructions

TABLE 1. Report the population that is being served by adult education classes conducted by the agency with Federal, State and/or local funds under Public Law 91-230, as amended. It should include participants from other Federal programs, such as CETA and WIN, for whom any direct services are being provided at clearly additional cost to the program (e.g., when an influx of 40 WIN participants would necessitate operating 2 or 3 extra classes). Every participant who completed 12 or more hours of instruction during the fiscal year should be included in this table.

A participant's age is to be reported as age at time of first class attended during the fiscal year.

The total number of adult education participants reported in Table 1, Line 4, of Total Column (1) should agree with the total figure shown on Table 2, Part A, Line 4, Column (b).

The racial/ethnic designations do not denote scientific definition or anthropological origins. For the purpose of this report, an enrollee may be included in the group to which he or she appears to belong, identifies with, or is regarded in the community as belonging. However, no person should be counted in more than one racial/ethnic group. The manner of collecting the racial/ethnic information is left to the discretion of the agency, provided that the system which is established results in reasonable accurate data. Definition of racial/ethnic categories are as follows:

a. White, Non-Hispanic: A person having origins in any of the original peoples of Europe, North Africa, or the Middle East.

b. Black, Non-Hispanic: A person having origins in any of the Black racial groups of Africa.

c. Hispanic: A person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.

d. Asian or Pacific Islander: A person having origins in any of the original people of the Far East, Southeast Asia, the Pacific Islands, or the Indian Subcontinent. This area includes, for example, China, Japan, India, Korea, the Philippine Islands, and Samoa.

e. American Indian or Alaskan Native: A person having origins in any of the original peoples of North America and who maintains cultural identification through tribal affiliation or community recognition.

# ADULT EDUCATION ANNUAL REPORT
Fiscal Year 19

Name of District/Agency ______________________ Date of Report ______________________

Signature of Local Adult Education Director ______________________ Title ______________________

## PART I — STATISTICAL

Table 1. Number of Adult Participants by Race, Ethnic Group, Age, and Sex

| Age | White Non-Hispanic | | Black Non-Hispanic | | Hispanic | | Asian/Pacific Islander | | American Indian/ Alaskan Native | | TOTAL |
|---|---|---|---|---|---|---|---|---|---|---|---|
| (a) | Male (b) | Female (c) | Male (d) | Female (e) | Male (f) | Female (g) | Male (h) | Female (i) | Male (j) | Female (k) | (l) |
| 1. 16-44 | | | | | | | | | | | |
| 2. 45-64 | | | | | | | | | | | |
| 3. 65 + | | | | | | | | | | | |
| 4. Total | | | | | | | | | | | |

## Table 2 Instructions

TABLE 2. Combines important data on starting levels, completions, and separations. As with Table 1, only participants who attended 12 or more hours of instruction during the fiscal year should be reported.

PART A:

Line 1, Elementary, is equivalent to Basic Education as defined by the Department of Education whether using grade level measures (1-8), APL measures, or Competency-based criteria.

Line 2 is Secondary Education as defined by the State agency whether using grade level measures (9-12), APL measures, or Competency-based criteria.

Line 3, Ungraded, includes instructional levels in which the general nature and difficulty of instruction is not organized on the basis of grade and which has no grade designation or grade-level standards. This line may be used to report participants receiving instruction designed for persons of limited English-speaking ability, students in learning labs, and students in homebased instructional settings.

Line 4. Report the sums of Lines 1 through 3.

Columns (b), (c), and (d). A participant's instructional level is to be reported as the level at the beginning of the fiscal year or upon initial entrance into the program during the fiscal year. Count each student one time only.

Completions. Report in Column (c), Number Completed Each Level, the number of students who completed the elementary level (Grades 1-8), the secondary level (Grades 9-12), or the ungraded level during the fiscal year. Students who left the program during the fiscal year because they completed Level 1 or Level 2 should not be counted as separations, but as completions. Count completions one time only. Students who completed both the elementary level and the secondary level during the fiscal year should be reported as completing the secondary level.

Column (d), Number Separated From Each Level. Report the number of students who separated from the program before the completion of the elementary level, the secondary level, or the ungraded level for one or more of the reasons identified in Table 2, Part B.

PART B:

Give the number of separations for Line 4, Column (d), Part A., by the type of reason for separating from the program. Count separations one time only. For example, a female who separated because she has a baby-sitting problem may be said to have a family problem. However, it is more accurate and useful to report her separation once under "child care problems." Reasons for separations have been delineated to show "positive" type reasons indicating certain program accomplishments, as well as problem-related reasons which may be amendable to State and/or Federal influence. For example, if health problems show up significantly in a given area as a reason for separations, the State Administrator might encourage curriculum emphasis on personal health care, hygiene, and nutrition.

The total figure reported in Line 4, Column (b) shoul agree exactly with the total reported in Table 1, Line 4, of Total Column (I).

The total figure reported in Column (d) should agree exactly with the total reported in Table 2, Part B, Line 13.

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## ADULT EDUCATION ANNUAL REPORT
Fiscal Year 19

__________________________________________
**Name of District/Agency**

**Table 2. Participant Progress and Separation Data by Instructional Level**

| Part A. Number of Participants | | | |
|---|---|---|---|
| Instructional Level (a) | Number Enrolled at Each Level (b) | Number Completed Each Level (c) | Number Separated From Each Level (d) |
| 1. Elementary (Grades 1-8) | | | |
| 2. Secondary (Grades 9-12) | | | |
| 3. Ungraded | | | |
| 4. TOTAL | | | |

Part B. Reasons for Separation
*(Give the number of separations for Line 4, Column (d), Part A.)*

| | | | |
|---|---|---|---|
| 1. To take a job. (Unemployed when entered program.) | | 8. Because of child care problems. | |
| 2. To take a better job. (Employed when entered program.) | | 9. Because of family problems. | |
| 3. To enter another training program. | | 10. Because of time class/program is scheduled. | |
| 4. Has met personal objective. | | 11. For other known reasons. | |
| 5. For lack of interest. | | 12. For unknown reasons. | |
| 6. Because of health problems. | | 13. TOTAL | |
| 7. Because of transportation problems. | | | |

### Table 3 Instructions

TABLE 3. Shows where participants attended classes, the number of fulltime programs, and the number of day and evening classes by type of classroom location. As with Table 1, the agency should report on every participant who completed 12 or more hours of instruction during the fiscal year.

"School Buildings" can be either public or private. For purposes of this report, junior high school buildings should be classified as secondary.

"Learning Centers," for purposes of the adult education program and this report, are adult instructional settings featuring (1) extensive use of programmed instruction, (2) flexible participant scheduling and attendance, (3) being open for extended periods of time and on a daily basis, e.g., 9:00 a.m. to 5:00 p.m. In cases where learning centers are found in any of the other types of locations listed, participants should be counted as attending learning centers, not the other types.

"Correctional Institutions" can be Federal, State, or local, and include youth offenders 16 years of age or older as well as adults. Inmates are the only ones to be included in this category.

"Hospitals" can be Federal, State, or local; mental institutions are included. Hospital inpatients and outpatients are the only ones to be included in this category.

"Work-sites" can be public or private, as long as they are operating places of employment for the participants. If hospital or correctional institution employees are trained at their respective job locations, they would be counted under the "work-site" category.

"State/local Institutions for the Handicapped" can be public or private and include day or residential schools that serve the physically or mentally handicapped adults 16 years of age or older.

"Home or homebased" instruction, provided by a teacher or paraprofessional, usually at the home of the student(s).

"Other locations" would include those that do not fit into one of the above categories. Church and storefront locations are among those that would generally fall into this category.

For purposes of this report, daytime classes are those ending before 5:00 p.m., and evening classes are those beginning after 5:00 p.m.

# ADULT EDUCATION ANNUAL REPORT
Fiscal Year 19

Name of District/Agency

Table 3. Number of Participants and Number of Daytime and Evening Classes by Type of Location

| Location of Classes (a) | Number of Participants (b) | Number of Daytime Classes (c) | Number of Evening Classes (d) | Number of Sites Operating Fulltime Programs (25 hours or more) (Unduplicated Count) (e) |
|---|---|---|---|---|
| 1. School Building | ▨ | ▨ | ▨ | ▨ |
| a. Elementary | | | | |
| b. Secondary | | | | |
| c. Community Coll. | | | | |
| 2. Learning Center | | | | |
| 3. Correctional Insti. | | | | |
| 4. Hospital | | | | |
| 5. Work Site | | | | |
| 6. Other Locations | ▨ | ▨ | ▨ | ▨ |
| a. 4 Year Colleges | | | | |
| b. Home/Homebased | | | | |
| c. State/Local Insti. for Handicapped | | | | |
| d. Other | | | | |
| 7. TOTAL | | | | |

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## Table 4 Instructions

TABLE 4. Requires data on impact of the adult education program on the service area. There are eighteen questions which deal with the size of the Community, the enrollment in basic and secondary adult education programs, graduation from adult education programs, important real-life activities of adult education program participants, and services provided for special target groups.

Provide a duplicated count in this table of program participants; that is, an individual participant may be counted in more than one item. PLEASE NOTE that if information for any question is not available, indicate N/A in the block provided.

## ADULT EDUCATION ANNUAL REPORT
Fiscal Year 19

________________________________________
Name of District/Agency

*SPECIAL INSTRUCTION: If information for any question is not available, indicate N/A in the block provided.*

Table 4. Adult Education Program Impact Data

| Persons who: | No. of Persons |
|---|---|
| 1. Are enrolled in an urban Adult Basic or Secondary Education Program (Community population over 100,000) | |
| 2. Are enrolled in a rural Adult Basic or Secondary Education Program (Community population under 2,500) | |
| 3. Are on waiting lists to enter program. | |
| 4. Completed Adult Basic Education Program through eighth grade level. | |
| 5. Enrolled in Adult Secondary Education Program after completing Adult Basic Education Program. | |
| 6. Graduated from Adult Secondary Education Program after starting in Adult Basic Education Program. | |
| 7. Obtained jobs as a result of experience gained in the Adult Education Program. | |
| 8. Changed to or were upgraded to a better job as a result of experience in the Adult Education Program. | |
| 9. Registered to vote for the first time. | |
| 10. Received U.S. Citizenship. | |
| 11. Received first driver's license. | |
| 12. Received training in completing income tax forms. | |
| 13. Are enrolled in Adult Basic Education Programs for institutionalized persons. | |
| 14. Separated from Adult Basic Education Programs for institutionalized persons. | |
| 15. Are enrolled in Adult Secondary Education Programs for institutionalized persons. | |
| 16. Separated from Adult Secondary Education Programs for institutionalized persons. | |
| 17. Are enrolled in programs for persons of limited English-speaking ability. | |
| 18. Separated from programs for persons of limited English-speaking ability. | |

## Table 5 Instructions

TABLE 5. Requires data on numbers of personnel and their fulltime equivalence for five different categories. It also provides for indication of the amount of State and/or local pre-service or in-service adult education program-related training received by paid personnel during the fiscal year.

Column (a) definitions for staff personnel categories are:

a. Administrative/Supervisory: Those professionals who are responsible for program management, administration, and supervision.

b. Local Teachers: Staff assigned to guide and direct the learning experience of students in an instructional setting, including responsibility for diagnosis, prescription, motivation, and evaluation of the adult learner.

c. Local Counselors: Staff assigned to perform the activities of assisting adult learners and of assisting instructors to assist learners in making personal plans, choices, and decisions in relation to education, career, and personal development.

d. Local paraprofessional: Staff member who works alongside a professional and assists him or her, but who does not have full professional status, e.g., teacher/classroom aide.

In Column (b), count one time only each employee of the agency who is being paid out of Federal, State and/or local adult education funds. Each employee should be reported in the personnel category where he or she does most of his or her work. "Administrative and Supervisory Personnel" includes teacher trainers and curriculum, counseling, and guidance specialists.

If a person performs more than one staff function, report that person one time only, in the staff function in which most of his or her time is spent.

If a position is vacated and subsequently filled during the fiscal year, report the position only once.

In Column (c), convert the personnel in Column (b) into an equivalent number of fulltime personnel according to the formula or method used by the agency in determining fulltime employment.

"State or Local Training" may include any Section 309 training, as well as in-service provided by educational institutions. It should include only that training that is clearly related to the program effort under personnel categories listed on page 7. Include in Table 4 information for only those persons who are paid from funds granted under the Adult Education Act. Please specify the various formulas or methods used in each of the categories. Use a separate sheet of paper and attach.

## Table 6 Instructions

Insert the amount of funds expended from the Adult Education Grant (306) for each of the categories indicated and for the total grant expenditure.

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# ADULT EDUCATION ANNUAL REPORT
## Fiscal Year 1979

Name of Agency ______________________________

**Table 5. Number of Paid Personnel, by Location and Type of Employment, and by Amount of Training**

| Organizational Placement and Type of Job Performed (a) | Paid Adult Education Personnel | | |
|---|---|---|---|
| | Total Number of Personnel (b) | Equivalent Number of Full-time Personnel (c) | Number Taking Training (d) |
| 1. Local Administrative and Supervisory Personnel | | | |
| 2. Local Teachers | | | |
| 3. Local Counselors | | | |
| 4. Local Paraprofessionals | | | |
| 5. TOTAL | | | |

**Table 6. Grant Expenditures by Program Category**

| Program Category | Amount |
|---|---|
| 1. Basic Education for Institutionalized Adults | $ |
| 2. Secondary Education for Institutionalized Adults | |
| 3. Basic Education for Non-Institutionalized Adults | |
| 4. Secondary Education for Non-Institutionalized Adults | |
| 5. Total Grant Expenditures | $ |

## PART II — NARRATIVE

The agency may attach a narrative to this report to provide any additional information which is deemed appropriate. The narrative may cover the organization or operation of the program areas in which the agency feels that the program has particular strengths or weaknesses, concepts which the agency believes to be unique or innovative, problem areas, or any other information which may be of value to the State Administrator or the U.S. Office of Education.

DEPARTMENT OF EDUCATION
Ralph D. Turlington, Commissioner
DIVISION OF VOCATIONAL EDUCATION
INDUSTRIAL PROGRAM
TALLAHASSEE, FLORIDA

## COSMETOLOGY PROGRAM REPORT OF CLASS ENROLLMENT, EXAMINATION, LICENSURE, AND FAILURE

For class which was completed between July 1, 19 and June 30, 19

Complete one form for each class.

| -1- Class Completion Data | -2- Total Number of Students Enrolled In Class | -3- Number of Students Who Left Before Completing Class | -4- Number of Students Completing Class | -5- Number of Graduates Successfully Passing First State Board Examination | -6- Number of Graduates Not Passing First Examination | -7- Number of Graduates Not Taking State Board Examination |
|---|---|---|---|---|---|---|
| | | | | | | |

B.64

School ____________________

Address ____________________

____________________

Instructor____________________

Please indicate types and numbers of students served.

_____ High School _____ Number of Students
_____ Post Secondary _____ Number of Students

This form is furnished by the Department of Education. Each county or junior college should request blanks as needed.

DVE 393

DEPARTMENT OF EDUCATION
Ralph D. Turlington, Commissioner
DIVISION OF VOCATIONAL EDUCATION
INDUSTRIAL EDUCATION PROGRAM
TALLAHASSEE, FLORIDA

## LIST STUDENT NAME AND STATE BOARD OF COSMETOLOGY ENROLLMENT NUMBER

| STUDENT NAME | STATE BOARD OF COSMETOLOGY STUDENT ENROLLMENT NUMBER |
|---|---|
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DVE 393

**State Office Use Only**

Part________________

Project No.________________

Fund Source No.________________

Agency No.________________

**Submit To:** FLORIDA DEPARTMENT OF EDUCATION
DIVISION OF VOCATIONAL EDUCATION
KNOTT BUILDING
TALLAHASSEE, FLORIDA 32301

**Attention:** Projects and Grants

## COMPREHENSIVE EMPLOYMENT AND TRAINING ACT OF 1978 – TITLE II, SECTION 204

## SPECIAL PROJECT GRANT AWARD

Fiscal Period: From____________________ To____________________

### I. IDENTIFYING INFORMATION

Name of Sub-Grantee (District/Institution/Agency)______________________________

Address of Sub-Grantee (District/Institution/Agency)______________________________

### II. AMOUNT OF GRANT AWARD

| COST CATEGORY | AMOUNT |
|---|---|
| Administration | $ |
| Training | $ |
| Services | $ |
| TOTAL | $ |

### III. CERTIFICATION

WE HEREBY CERTIFY THAT:

Funds in the project grant award will be used only to provide vocational education training and services for eligible participants in accordance with applicable federal and state laws, rules and regulations; all programs will be conducted in accordance with goals, objectives and criteria in the Non-Financial Agreement; all funds will be used to extend or supplement the local educational effort and, will be expended in accordance with Department of Education General Terms and Conditions for Projects attached hereto.

______________________________
District Superintendent/Community College President/Agency Director

______________________________
District School Board Chairperson/District Board of Trustees Chairperson

### STATE OFFICE USE ONLY

Expenditures For This Project May Not Exceed: $____________________

Authorized:

______________________________
Director, Division of Vocational Education

______________________________
Coordinator, Projects and Grants

DVE 429

an equal opportunity employer

## ITV-1 (CE 126) Scheduling of Videotapes

This report provides schedule requests for videotapes from the Department of Education (DOE) library. The date the first lesson is needed and number of weeks each lesson is needed are data items indicated.

# HIGHER EDUCATIONAL GENERAL INFORMATION SURVEYS (HEGIS)

This set of reports has been provided for a number of years on a voluntary basis. It has been dependent upon the good will and cooperation of the institutions of higher education. This is in contrast to The OCR Survey which represents a mandatory set of reports.

Because of the similarity of certain information collected in both surveys, HEGIS has now become the collecting agency for these types of information. "Fall Enrollment and Compliance Report of Institutions of Higher Education" and "Degrees and Other Formal Awards Conferred", OE Form 2300-2.3 and OE Form 2300-2.1, respectively, are used in both surveys.

## 2300-1 Institutional Characteristics of Colleges and Universities

This form is a computer printout from HEGIS that displays information previously submitted about community colleges. Contained in it are institutional characteristics provided in the previous year's survey. The community college is requested to provide only changes since the previous submission. Among data items contained in the printout are: community college name and address, accreditations, type student body, calendar system, degrees offered, type of programs and administrative personnel by name and rank.

## 2300-2.1 Degrees and Other Formal Awards Conferred

This form (Part C only) provides information about degrees and awards to students based on less than 4 years of work beyond high school Associate degrees and other formal recognition are indicated by race/ethnic group and by sex for each major curriculum category. This information is collected on behalf of The OCR Survey as well so that collection takes place only once.

## 2300-2.3 Fall Enrollment and Compliance Report

This form reports information about enrollments (headcount) according to race/ethnic group and by sex. Both full-time and part-time students are included. As with OE Form 2300-2.1, this information is collected on behalf of The OCR Survey as well.

## 2300-2.8 Residence and Migration of College Students

This information is collected on an irregular basis.
It reports by "home state' the number of credit students by various categories. These are: first-time freshmen, transfers, and unclassified. These categories are further reported by part-time and full-time.

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## 2300-3 Salaries, Tenure, and Fringe Benefits of Full-Time Instructional Faculty

The report provides information about employees in institutions of higher education relative to:
a. resource categories by sex
b. salaries of selected administrators by sex
c. salaries and tenure of full-time instructional faculty by sex

## 2300-4 Financial Statistics of Institutions of Higher Education

The report provides financial information about institutions of higher education. Six basic types of information are reported. These are:
a. current revenues by source
b. current expenditures and transfers
c. capital outlay assets
d. indebtedness on capital outlay items
e. endowment details
f. changes in fund balances

The following additional information is collected from all public institutions:
a. revenues
b. expenditures
c. debt outstanding, issued and retired
d. cash and security holdings

## 2300-5 College and University Libraries

This report reflects information about the library function in terms of numbers of books, library staffing by sex, library operating expenditures and related items. In addition, the State of Florida collects information having to do with audio/visual media and staffing by educational level (Bachelor's degree or less and graduate degrees).

## 2300-8 Adult/Continuing Education: Noncredit Activities in Institutions of Higher Education

This report indicates the number of headcount enrollments (registrations) in noncredit adult/continuing education programs. Information is collected by academic unit and field of study.

# THE OFFICE FOR CIVIL RIGHTS ANNUAL SURVEY OF PROGRESS IN IMPLEMENTING STATE-WIDE HIGHER EDUCATION DESEGREGATION PLANS
## (THE OCR SURVEY)

This set of federal reports is required by the Office for Civil Rights of the U. S. Department of Education. An "as of" date in October is used for term data and the prior academic year is used for annual data. Individuals in all reports are classified by the race/ethnic groups to which they belong and by sex. Forms must be carefully reviewed before completing and one is cautioned not to use old forms since changes occur from year to year. The OCR 4000 Series was used in the Fall of 1978 covering that term for some forms and the 1977-78 academic year for other forms. The OCR 5000 Series was used in the Fall of 1979.

Following is a brief description of each report form required in this series:

### EEO-6 Higher Education Staff Information

This form is substituted for Ala and is used to report data on all full-time and part-time staff members, both professional and support. Part V is added to gather necessary data not provided for on the basic EEO-6. Salary data and contract length are reported for all staff and tenure and academic rank are reported for professional staff.

### Alb New Employees in Institutions of Higher Education

This form reports all new employees hired during the twelve months preceding the October "as of" date. Tenure and academic rank are required for the professional staff. No salary data are required.

### A2 Employees of State Agencies of Higher Education

This form covers the professional and non-professional employees of State agencies and governing boards for higher education. The data collected refers to the number of full-time and part-time employees by racial/ethnic identification, sex, and occupational activity. Both total employees and new hires (in last twelve months) are included.

### A3 Retirements, Resignations, and Dismissals of Employees in Institutions of Higher Education

This form reports all retirements, resignations, and dismissals for full-time professional employees for the twelve months preceding the October "as of" date. Academic rank and tenure status are required.

### A4 Promotion of Employees in Institutions of Higher Education

All promotions of full-time professional employees are reported by academic rank and tenure status.

### A5 Composition of Governing Boards for Higher Education

All college trustees are reported according to the length of term and according to the method of appointment.

### B1 Applications, Acceptances, and Actual Enrollment

This form is concerned with the number of individuals who apply for admission as students, the number of applicants who were accepted, and the number of acceptances who actually enrolled during the given Fall term. These individuals are classified as first-time-in-college or transfer students, county (attendance area) residents, out-of-county but in-state residents, out-of-state but within the United State residents, and non-resident aliens.

### 2300-2.3 Fall Enrollment and Compliance Report (Refer to HEGIS 2300-2.3)

### B3 Financial Assistance to Students in Institutions of Higher Education

This form reports all individuals who apply for financial assistance and, of this group, those who actually enroll. Further data are reported on those who actually receive financial assistance in the categories of grants, loans, scholarships, and employment. Included are dollar amounts awarded, the number of awards made, and the number of unduplicated recipients involved.

### 2300-2.1 Degrees and Other Formal Awards Conferred (Refer to HEGIS 2300-2.1)

# APPENDIX C

# CCMIS TASK FORCE MEMBERS

# CCMIS TASK FORCE MEMBERS

| | |
|---|---|
| Mr. Edward R. Allen | Division of Public Schools |
| Dr. G. Thomas Delaino | Santa Fe Community College |
| Dr. Robert E. Eberley | Manatee Junior College |
| Ms. Linda Lillien | Miami-Dade Community College |
| Mr. Steve Megregian | Brevard Community College |
| Dr. Eric R. Mills | Florida Junior College at Jacksonville |
| Mr. Robert L. Ritterhoff | Central Florida Community College |
| Dr. Joyner Sims | Chipola Junior College |
| Ms. Mildred W. Suttle | Palm Beach Junior College |
| Mr. Lee P. Young | Valencia Community College |
| Dr. Frederick W. Atherton | Division of Community Colleges |
| Dr. Martha Chang | Commissioner's Office |
| Mr. Jack R. Eberley | Division of Community Colleges |
| Ms. Loyce Farr | Office of Educational Facilities Construction |
| Mr. Robert L. Schmalfuss | Division of Vocational Education |
| Mr. Harry L. Rudy | Division of Community Colleges |

# APPENDIX D

# FACILITIES INVENTORY UPDATE EXAMPLES

Types of Number Change Transactions

File 1: Site File

Only one type of number change transaction is possible in the site file. It applies to a site number.

a. Change one site number to another site number. Indicate file number 1, existing site number and new site number.

Example 1a:

| File Number | Existing Key Element |  |  |  | New Key Element |  |  |  |
|---|---|---|---|---|---|---|---|---|
|  | Site | Facility | Room | Suffix | Site | Facility | Room | Suffix |
| 1 | 3 |  |  |  | 10 |  |  |  |

Site number can be switched simultaneously. May also need to change site number in facility file 2 and room file 3 (See examples 2c and 3g).

File 2: Facility File

Four types of number change transactions are possible in the facility file. One applies to a facility number, two apply to a site number and one applies to both a site number and a facility number.

a. Change one facility number to another facility number (site number stays the same).

Indicate file number 2, existing site number, existing facility number and a new facility number.

Example 2a:

| File Number | Existing Key Element |  |  |  | New Key Element |  |  |  |
|---|---|---|---|---|---|---|---|---|
|  | Site | Facility | Room | Suffix | Site | Facility | Room | Suffix |
| 2 | 6 | 42 |  |  |  | 71 |  |  |

Facility numbers can be switched simultaneously. May also need to change facility number in room file 3 (See example 3e).

b. Change the site number for one facility to another site number (facility number stays the same).

Indicate file number 2, existing site number, existing facility number and new site number.

Example 2b:

| File Number | Existing Key Element |  |  |  | New Key Element |  |  |  |
|---|---|---|---|---|---|---|---|---|
|  | Site | Facility | Room | Suffix | Site | Facility | Room | Suffix |
| 2 | 4 | 12 |  |  | 5 |  |  |  |

May also need to change site number for the facility in room file 3 (See example 3f).

c. Change the site number for all facilities on that site to another site number (facility numbers stay the same).

Indicate file number 2, existing site number and new site number.

Example 2c:

| File Number | Existing Key Element |  |  |  | New Key Element |  |  |  |
|---|---|---|---|---|---|---|---|---|
|  | Site | Facility | Room | Suffix | Site | Facility | Room | Suffix |
| 2 | 8 |  |  |  | 1 |  |  |  |

May also need to change site number in site file 1 and room file 3 (See examples 1a and 3g).

d. Change both the site number and the facility number for one facility to another site number and another facility number.

Indicate file number 2, existing site number, existing facility number, new site number and new facility number.

Example 2d:

| File Number | Existing Key Element |  |  |  | New Key Element |  |  |  |
|---|---|---|---|---|---|---|---|---|
|  | Site | Facility | Room | Suffix | Site | Facility | Room | Suffix |
| 2 | 7 | 28 |  |  | 9 | 16 |  |  |

May also need to change site number and facility number in room file 3 (See example 3h).

## File 3: Room File

Eight types of number change transactions are possible in the room file. Three apply to a room number and/or a room-number suffix, two apply to a facility number, two apply to a site number and one applies to both a site number and a facility number.

a. Change one room number to another room number within the same facility (site number and facility number stay the same).

Indicate file number 3, existing site number, existing facility number, existing room number and room number.

Example 3a:

| File Number | Existing Key Element |  |  |  | New Key Element |  |  |  |
|---|---|---|---|---|---|---|---|---|
|  | Site | Facility | Room | Suffix | Site | Facility | Room | Suffix |
| 3 | 2 | 64 | 783 |  |  |  | 378 |  |

Room numbers within one facility can be switched simultaneously.

b. Change one room-number suffix to another room-number suffix within the group of suffixes for the same room number (site number, facility number and room number stay the same).

Indicate file number 3, existing site number, existing facility number, existing room number, existing room-number suffix and new room-number suffix.

Example 3b:

| File Number | Existing Key Element | | | | New Key Element | | | |
|---|---|---|---|---|---|---|---|---|
| | Site | Facility | Room | Suffix | Site | Facility | Room | Suffix |
| 3 | 9 | 56 | 810 | P | | | | Q |

Room-number suffixes within the group of suffixes for one room number can be switched simultaneously.

c. Change a room number and room-number suffix combination to another room number and room-number suffix combination within the same facility (site number and facility number stay the same).

Indicate file number 3, existing site number, existing facility number, existing room number, existing room-number suffix, new room number and new room-number suffix. A blank new room-number suffix deletes an existing suffix.

Example 3c:

| File Number | Existing Key Element | | | | New Key Element | | | |
|---|---|---|---|---|---|---|---|---|
| | Site | Facility | Room | Suffix | Site | Facility | Room | Suffix |
| 3 | 8 | 49 | 725 | D | | | 427 | G |
| 3 | 6 | 31 | 432 | Z | | | 432 | |

Room number and room-number suffix combinations within one facility can be switched simultaneously.

d. Change the facility number for one room to another facility number (site number, room number and suffix stay the same).

Indicate file number 3, existing site number, existing facility number, existing room number and suffix and new facility number.

Example 3d:

| File Number | Existing Key Element | | | | New Key Element | | | |
|---|---|---|---|---|---|---|---|---|
| | Site | Facility | Room | Suffix | Site | Facility | Room | Suffix |
| 3 | 5 | 91 | 218 | | | 19 | | |

e. Change the facility number for all rooms within that facility to another facility number (site number, room numbers and suffixes stay the same).

Indicate file number 3, existing site number, existing facility number and new facility number.

Example 3e:

| File Number | Existing Key Element |  |  |  | New Key Element |  |  |  |
|---|---|---|---|---|---|---|---|---|
|  | Site | Facility | Room | Suffix | Site | Facility | Room | Suffix |
| 3 | 1 | 4 |  |  |  | 8 |  |  |

May also need to change facility number in facility file 2 (See example 2a).

f. Change the site number for all rooms in one facility to another site number (facility number, room numbers and suffixes stay the same).

Indicate file number 3, existing site number, existing facility number and new site number.

Example 3f:

| File Number | Existing Key Element |  |  |  | New Key Element |  |  |  |
|---|---|---|---|---|---|---|---|---|
|  | Site | Facility | Room | Suffix | Site | Facility | Room | Suffix |
| 3 | 7 | 35 |  |  | 2 |  |  |  |

May also need to change site number for the facility in facility file 2 (See example 2b).

g. Change the site number for all rooms on that site to another site number (facility numbers, room numbers and suffixes stay the same).

Indicate file number 3, existing site number and new site number.

Example 3g:

| File Number | Existing Key Element |  |  |  | New Key Element |  |  |  |
|---|---|---|---|---|---|---|---|---|
|  | Site | Facility | Room | Suffix | Site | Facility | Room | Suffix |
| 3 | 6 |  |  |  | 2 |  |  |  |

May also need to change site number in site file 1 and facility file 2 (See examples 1a and 2c).

h. Change both the site number and the facility number for all rooms in one facility to another site number and another facility number (room numbers and suffixes stay the same).

Indicate file number 3, existing site number, existing facility number, new site number and new facility number.

Example 3h:

| File | Existing Key Element | | | | New Key Element | | | |
|---|---|---|---|---|---|---|---|---|
| Number | Site | Facility | Room | Suffix | Site | Facility | Room | Suffix |
| 3 | 4 | 90 | | | 3 | 50 | | |

May also need to change site number and facility number in facility file 2 (See example 2d).

# APPENDIX E

# FEEDBACK SYSTEM

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## Feedback System

The Feedback System is a data processing system that combines information from the community colleges, the State University System, and the Florida Department of Labor and Employment Security, to produce a report indicating the status of community college graduates.

The community colleges are encouraged, but not required, to participate. However, while there has yet to be 100% participation, no college has joined and then dropped out. The major benefit of the system in terms of reports sent to the Division is its use in completing the AA-2 (Section 16). The AA-2 report requires the status of previous years graduates in terms of employed in field related to community college major, employed in unrelated field, continuing education, unemployed, not in labor force, or status unknown. The Feedback System can tell a college if its graduates are continuing their education in the SUS or are employed in Florida. The limitations include no data from private or out-of-state educational institutions and the use of Standard Industrial Classification (SIC) codes in relation to employment. These codes tell the industry of the employer rather than the actual job of the employee.

Some of the colleges are beginning to use the results of the System to produce information on percent employed by college major and starting salaries for different occupational fields. There is also good potential in terms of counseling students concerning career choices for a given area.

The following page indicates the data requested from the community colleges. Only the social security number of the student, the colleges' FICE code, and student type are required. The other data items allow the results to be sorted by major, race, and sex. This information is very useful for state reports and in house work.

The procedure has been of value to those colleges participating and is constantly being refined as information on ways to use the results are received by the Division.

**State of Florida**
**Department of Education**
**Tallahassee, Florida**
**Ralph D. Turlington, Commissioner**
**An equal opportunity employer**

Page ____ of ____

# MACHINE RECORDS' FORMAT

Date:

**Field Characteristics:**

A = Alphabetic only
A/N = Alphameric
N = Numeric only
Z = Zoned numeric
P = Packed decimal
R = Right justified with leading zeros
L = Left justified

## Data Description

This data is the community college input to the Feedback System. Of the seven fields, three - SSN, FICE and TYPE are required. The other four - RACE, SEX, MAJOR and HOURS are optional.

| Item No. | From To | Size | Field Char. | Field Name | Field Description |
|---|---|---|---|---|---|
| 1 | 1-9 | 9 | N | SSN | Unique social security code (Required) |
| 2 | 10 | 1 | A | RACE | HEW Race Code (Optional)<br>A = Asian or Pac. Islander<br>I = Am. Indian or Alaskan Native<br>B = Black (Not of Hispanic origin)<br>H = Hispanic<br>W = Am. White<br>O = Non-resident Alien<br>X = Not reported |
| 3 | 11 | 1 | A | SEX | Sex of student (Optional)<br>M = Male<br>F = Female<br>X = Not reported |
| 4 | 12-19 | 8 | N | MAJOR | Full 8-digit ICS Code of student's major (Optional) |
| 5 | 20-23 | 4 | R | HOURS | Credit hours earned or accumulated by student at reporting institution (Optional) |
| 6 | 24-29 | 6 | R | FICE | FICE number of reporting institution (Required) |
| 7 | 30 | 1 | A | TYPE | Code for completers and leavers (Required)<br>A = Completers<br>B = Leavers |

# APPENDIX F

# UPDATE DISTRIBUTION FORM

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TO: Recipients of the CCMIS Procedures Manual

FROM: Harry L. Rudy Harry L. Rudy

SUBJECT: Updates to the CCMIS Procedures Manual

As the need occurs, updates to the CCMIS Procedures Manual will be prepared and distributed to Manual holders who wish to receive them. In order to be sure that updates are distributed properly, please complete and return the form provided below. This information will be used as the basis for a CCMIS Procedures Manual Update distribution list.

---

Update Distribution Form

CCMIS Procedures Manual

Please send updates to the CCMIS Procedures Manual to:

Name:____________________________________________

College:__________________________________________

Return to: Bureau of Research and Information Systems
Division of Community Colleges
Department of Education
310 Collins Building
Tallahassee, Florida 32301